

MFMC pledges to provide superior client-focused financial services in order to be your most trusted advisor. We communicate and educate our clients about financial management and create an environment that empowers optimal decision making. Our exceptional team will provide our clients with the resources, guidance and opportunities to achieve their financial life plan.

Values

- Extremely Competent: expert and well-informed
- Our consulting staff has a wide range of talents and education that include Masters of Business Administration from very highly ranked Business schools.
- Our designations and certifications, and licenses include: CPA, PFS, CFP®, CMA, ESQ, EA, CFS® and many FINRA Licenses and insurance licenses as well.

- Honest and Ethical: it's the only way
- We pride ourselves on our integrity and objectivity. We always put clients' interests before our own and are on the lookout for any external conflicts of interest affecting our clients' lives.

- With our vast array of designations, certifications, and licenses comes the responsibility to follow various organizations' codes of conduct in order to maintain our coveted credentials.

- Extraordinarily Committed: clients and families first
- We are always willing to be flexible and meet on an as needed basis as well as meet in the early morning, late evening or even on weekends. Staff hours are flexible so they can meet their personal life-balance demands as well.
- Everyone here at MFMC has a responsibility to communicate with all our clients in a timely fashion and never leave anyone in the dark.

- Confident and Confidential: we know our stuff and keep yours to ourselves
- Through maintaining many hours of continuing education required by our firm and professions, we are always "in-the-know" and on the cutting edge
- Client information will never be shared without your expressed consent. We will provide you with our firm's privacy policy upon our first meeting and on an annual basis. All our representatives have signed a confidentiality agreement as a prerequisite to becoming employed.

- Appropriately Diligent: to secure high-quality solutions
- We utilize many strategic alliances to always know what solution works best for your

specific situation.

- MFMC takes its research very seriously and our investment committee meets at least monthly to make sure our clients' portfolios are most appropriately positioned for their financial success.

Purpose

To provide superior client focused comprehensive financial planning services that make a real impact in enhancing the quality of life for our clients and their families.