FINANCIAL ADVISORS NETWORK, Inc.

How is FAN Different?

Financial Advisors Network, Inc. (FAN) is an investment advisory firm with a fiduciary duty to its clients, which is why we offer two outside custodians to hold client assets. This keeps us objective, transparent and truly independent in our Registered Investment Advisors (RIA) model.

FAN's team members are not incentivized to sell firm products, but rather, we earn our fee based on your account balance over time. We offer numerous financial services that are tailored to your specific needs and do not make commissions in our advisory services.*

*Nominal fees may apply and be charged directly by custodians.

LPL Financial

As the nation's largest independent dealer-broker, LPL is partner to more than 14,000 financial advisors and approximately 700 financial institutions.**

charles SCHWAB

Charles Schwab is the #1 custodian by market share for registered investment advisor custody, with more than 7,500 advisors served and $3.32 trillion in client assets.**

**Note: as reported in Financial Planning Magazine, 1996-2018, based on total revenue.

3 Key Components

We are a family office with in-house investment management that focuses on tax planning strategies. These three key components make us unique in the way we deliver education, comprehensive financial planning and excellent service.

Family Office

We promote a family-style office. Our firm is designed to be client-centric dedicating both a Paraplanner and Financial Advisor to work with each client. Through our many services, we strive to provide quality care for each client as if they were a member of our own family.

In-house Investment Management

We actively manage our portfolios in-house and do not outsource our investment decisions. Because this work is done directly at the FAN office, we are able to maintain significantly lower internal fees than our competitors.

Tax Planning Strategies

We understand that investments can have tax implications. FAN's collective experience of 50+ years in tax planning may provide clients with a competitive level of tax savings. Our firm focuses on ever-changing tax laws and continuously educates clients on these laws so we can make sound decisions together.

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Investing involves risk, including loss of principal. No strategy assures success or protects against loss. Please note that Financial Advisors Network, Inc. does not offer tax advice. Please consult a qualified tax advisor for tax matters. Financial Advisors Network, Inc. is a registered investment advisory firm.