FIA Foundations Investment Advisors

The FIA Advantage:

Boutique Money Management Services

- Daily portfolio management overseen by Chief Investment Officer Darren Leavitt, CFA® with over 20 years of Institutional Money Management experience
  - 5 actively managed portfolios with an enhanced emphasis on reducing volatility
  - Focus on minimizing fees
  - Open architecture – utilizing low cost ETFs, no load mutual funds, closed end funds, stocks and alternative investments
  - Strategic models managed tactically — if market conditions deteriorate, we can go to cash

Learn a Proven Process of growing your Assets under Management

- Jeff Junior, President of Trajan Wealth, has grown his Managed Money business to over $100 million in just 3 years while increasing his annuity business to over $20 million annually.
  - The perfect compliment to your Guaranteed Lifetime Income Planning

Foundations Investment Advisors, LLC. (FIA) is a SEC Registered Investment Advisor (RIA) that specializes in building actively managed portfolios. Each portfolio is diversified based on the client's risk tolerance and strives to provide superior risk-adjusted returns.

To learn more about becoming a Investment Advisor Representative (IAR) and leveraging The FIA Advantage call Laurie Simons at 480-214-9837 or email at Laurie@FIWealth.com

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