

The Antonio Financial Group is proud to serve a wide ranging group of clientele.

Pre-retirees

You've worked hard and need solutions to ensure you stay in retirement. Your concerns may include:

- Accumulated qualified plan funds
- Inflation risk
- Managing risk
- Obtaining both growth and income
- Maximizing social security benefits
- Evaluating early retirement options

Businesses & plan sponsors

You might be a business owner and or plan sponsor needing guidance and objective advice on how to provide for your own well-being and for your employees. Your concerns may include:

- Tax deductibility
- Plan design
- Appropriate investment offerings
- Employee benefit satisfaction
- Costs
- On-going management and guidance

Health care professionals

You may be working in a solo practice, within a group of related professionals or for a organization with a focus on health care. Your concerns include:

- Tax deductibility
- Plan design
- Appropriate investment offerings
- Employee benefit satisfaction
- Costs
- On-going management and guidance

- Ability to defer maximum funds
- Creditor protection

Professionals in higher education

You have dedicated your life to being a steward of high education. As a professor, you have made a commitment to educating the next generation of professionals to become great contributors to society. As an administrator in higher education, you have made it your goal to be a beacon of leadership to those influencing and training the next generation of professionals. Your mutual concerns may include:

- Adequate accumulated assets
- Risk management
- Asset longevity
- Diversification
- Utilization of tax benefited plans
- Maximization of tax benefited plans
- Holistic approach

Next Generation professionals

You are on the forefront of making inroads in your chosen profession. Among other things, you seek to be the best at what you do and want access to information in varying mediums. Your concerns may include:

- Starting a plan early
- Having confidence in future retirement plans
- Working with limited resources (initially)
- Saving enough for the long-run
- Taking appropriate risk
- Finding alternatives to social security and other social programs
- Being aggressive to manage the risk reward spectrum