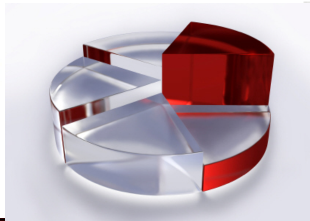
the Hechtman Group ltd

Exceptional CPA services for small businesses with big plans



THG Prism Service

MY - CFO

for
Wealth Building
Individuals and Families

Enjoy the power that a CFO brings to building and managing your assets — but on a part-time basis.

Realize the convenience of having a trusted professional to help organize and manage your financial affairs—making your life easier.

We serve as the financial team for the successful individual and/or wealth building family. Ranging from strategic advice to practical hands-on services, MY-CFO is designed to meet the requirements of busy individuals who need:

- ☐ Access to senior level experience and knowledge;
- ☐ Trusted advisor support for important decisions;
- ☐ Experts in managing detailed financial activities;
- ☐ Accessible service suited to the busy professional;
- ☐ A "having it my way" service experience that meets part-time, varied and changing needs.

Outsourced financial guidance, ***and expertise to meet life's*** multi-faceted wealth building needs.

Our Clients Say...

"I have been with THG for over 40 years. They are professional, accurate, responsive and helpful. They are more than accountants; they relate to you as a per***son."***

Dr. Sheldon J. Meyers

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"At THG you don't feel like just another client. You feel like you ***are the only client."***

Lisa Gutierrez

Do You Need My-CFO?

__ Your financial decisions are becoming more numerous and more complex.
__ Your financial providers (bankers, stockbrokers etc.) ask for documents you don't have—or can't find.
__ You are not sure about the tax and/or future planning implications of important decisions you are facing.
__ You wonder if you have done the right things to ensure a comfortable future for your family (college, healthcare, retirement etc.) and need a trusted advisor to talk with.

If you can say "yes" to any of these questions, we are here to help.

(Please see an overview of our services, on the following page.)

Review the scope of our THG Prism services and let's have a conversation about tailoring a MY- CFO program just for your unique needs.

MY- CFO SERVICES

Accounting and Compliance Services

- ☐ Personal Financial Statement Preparation
- ☐ Budgeting, cash flow analysis, forecasting
- ☐ Budgeting system implementation and training
- ☐ Cash flow monitoring
- ☐ ROTH IRA conversion analysis
- ☐ Tax preparation

Wealth Management Services

- ☐ Buy-Sell analysis of assets (rental properties, etc.)
- ☐ Tax Planning
- ☐ Educational Planning
- ☐ Family Transition/Divorce Consulting
- ☐ Review and analysis of personal financial statement
- ☐ Insurance review and recommendations
- ☐ Recommend and implement THG Partner Services
  - Retirement Planning
  - Wealth Management
  - Estate Planning
  - Insurance Planning
- ☐ Ongoing facilitation of THG Partner Services
  - Wealth Management analysis
  - Estate Planning
  - Retirement Feasibility
  - Investment Risk Profile
  - Asset Allocation Strategy
  - Insurance needs assessment
    (Life, Disability, LTC, Health/HSA, FSA, Dependent care coverage, etc.)

BOOKKEEPER SERVICES ...*offered only in conjunction with MY-CFO Services*

- ☐ Bill paying
- ☐ Daily cash flow tracking
- ☐ Implementation of software for tracking
- ☐ Implementation of online banking
- ☐ Credit card monitoring