



## Navigate your financial goals with Compass.

**LEARN MORE** Contact our team for more information.

### HK Financial Services

www.hkfs.com  
clientservice@hkfs.com  
800.791.8994

### CS&L CPAs

www.cslcpa.com  
Bradenton | 941-748-1040  
Sarasota | 941-954-4040  
Tampa | 813-490-4490

CS&L CPAs and HK Financial Services (HKFS) offer clients a smart investment management platform called Compass. This automated platform uses a customized suite of portfolios utilizing select exchange traded funds (ETFs) while also providing the benefits of professional oversight.

### Experience the difference

- Convenient online account opening, updates and reviews
- Annual review to confirm your asset allocation is still appropriate to your situation
- High-level service team available to answer your questions
- Continued coordination of tax and investment planning with your CPA and financial planning consultant
- Holistic, independent and objective advice for your entire financial plan

### Addressing all of your financial needs

- Investment management
- Insurance planning
- Retirement planning
- Transfers, rollovers and IRA distributions
- Tax planning

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