Signature | Financial Solutions

Celebrating 30 Years of Financial Journeys

30 Years ANNIVERSARY

About Us

What started as a modest local corporate office has grown into one of the region's leading financial services firms—built on relationships, integrity, and doing what's right for the client.

For more than 30 years, we've helped people design strategies to retire confidently, invest wisely, protect what matters most, and navigate life's big financial decisions. Today, Signature Financial Solutions brings together founding advisors, affiliate practices, and a growing team of Signature Financial Professionals who share a common purpose: helping clients feel more in control of their financial lives.

From our headquarters in Tampa and locations throughout Florida, the southeast and Virginia, we combine the personal touch of a local advisor with the resources of a larger network—so you're supported by a team of experts, not just a single person.

Who We are

Independent & Fiduciary-focused
Our advisors provide guidance that's driven by your goals, not proprietary products or sales quotas.

Advisor-built, Advisor-focused
Our founding advisors transformed a single office into a regional firm by creating a place where professionals can collaborate and deliver higher-quality advice to the clients they serve.

A Network of Affiliate Firms and Professionals
Over time, like-minded advisors and affiliate companies have joined the Signature family—bringing specialized experience in retirement planning, investments, business planning, and more.

Locally Rooted, Regionally Connected
With offices across the Southeast, and clients nationwide, we're large enough to offer depth—yet small enough to stay personal.

**Local Guidance. Regional Strength.
Signature Solutions.**

Why Clients Choose Signature Financial Solutions

Planning first, solutions second
We start with a clear understanding of your goals, cash flow, and total financial picture. Only then do we recommend investments, insurance, or other strategies.

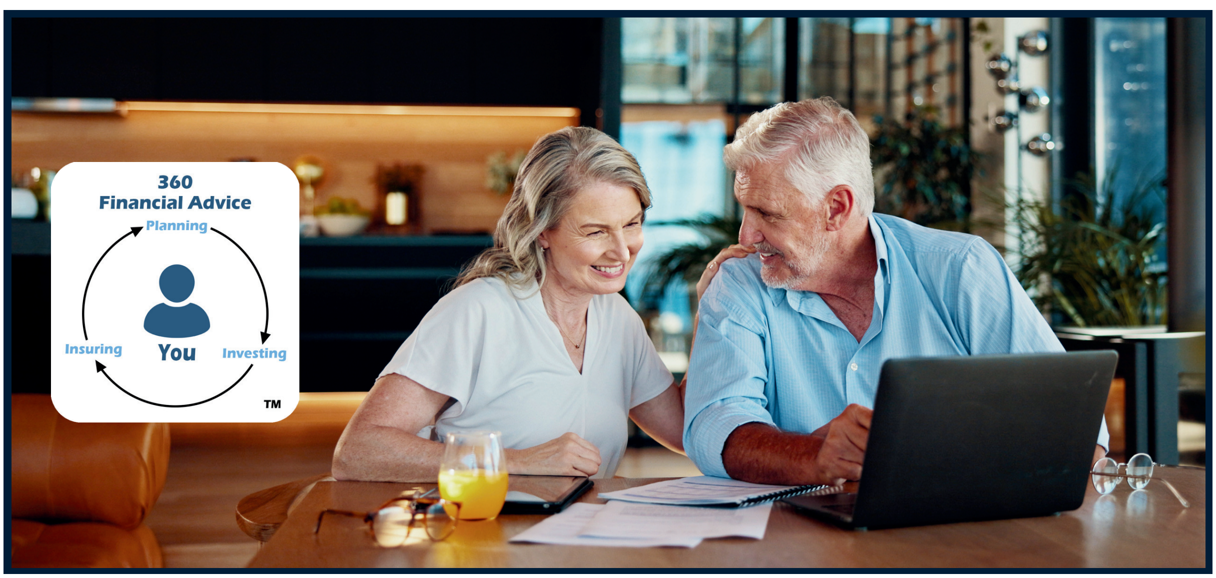
A team behind every relationship
You may work primarily with one advisor, but you also benefit from the collective insight of our broader team and affiliate firms—each bringing specialized experience to the table.

Independent advice you can understand
We take pride in explaining your options in plain language, so you always know why a strategy makes sense, not just what it is.

Deep retirement and investment expertise
Our advisors help you plan for income, Social Security, pensions, DROP programs, and investment portfolios designed to match your comfort level with risk.

Protection for life's "what-ifs"
We integrate insurance strategies—life, disability, and long-term care—into your overall plan to help protect your income and the people who depend on you.

A long-term partnership
Our relationships often span decades and generations. We'll be here for the milestones, the curveballs, and everything in between.



Our Services for Individuals & Families

Your financial life is more than just one account or product. We help you coordinate planning, investments, tax and estate strategies, and protection so everything works together toward your goals.

Investments & Wealth Management

- **Asset Management** – Portfolios aligned with your goals, time horizon, and risk tolerance.
- **Portfolio Analysis** – Reviewing current holdings for diversification, cost, and tax efficiency.
- **Risk Analysis** – Comparing your comfort level with the actual risk in your portfolio.
- **Advanced Designs** – Strategies for business owners, executives, and high-net-worth families.

Financial Planning

- **Comprehensive Financial Planning** – A roadmap from where you are to where you want to be.
- **Financial Wellness** – Building healthier money habits and reducing financial stress.
- **Financial Coaching** – One-on-one support for everyday financial decisions.
- **Retirement Income Strategies** – Turning savings and benefits into sustainable income.
- **Cash Flow & Goal Planning** – Aligning saving, debt, and spending with your priorities.
- **Life Event Planning** – Guidance through major transitions like career changes, marriage, divorce, relocation, or selling a business.

Tax, Estate & Legal Coordination

- **Tax Planning** – Making your overall plan more tax-efficient, in coordination with your tax professional.
- **Wills & Trusts** – Reviewing documents from a planning lens to identify gaps.
- **Key Legal Documents** – Coordinating with your attorney on POAs, health directives, and related items.

Insurance & Protection

- **Life & Disability Insurance** – Protecting your income and the people who depend on you.
- **Long-Term Care Planning** – Addressing the potential cost of extended care.
- **Annuities** – Income and accumulation options to support retirement, when appropriate.
- **Policy Reviews** – Checking existing coverage to see if it still fits your needs.

"Clients who work with an advisor are 30–40 % points more likely to feel on track for retirement and often retire years earlier."

Source: Northwestern Mutual 2024 Planning & Progress Study (The Harris Poll), fielded January 3–17, 2024 among 4,588 U.S. adults. Results are not guaranteed and may not reflect the experience of all clients.

“Small-business owners who partner with a financial professional are more likely to grow, hire, and offer competitive benefits, and they often retire up to seven years earlier than those who go it alone”

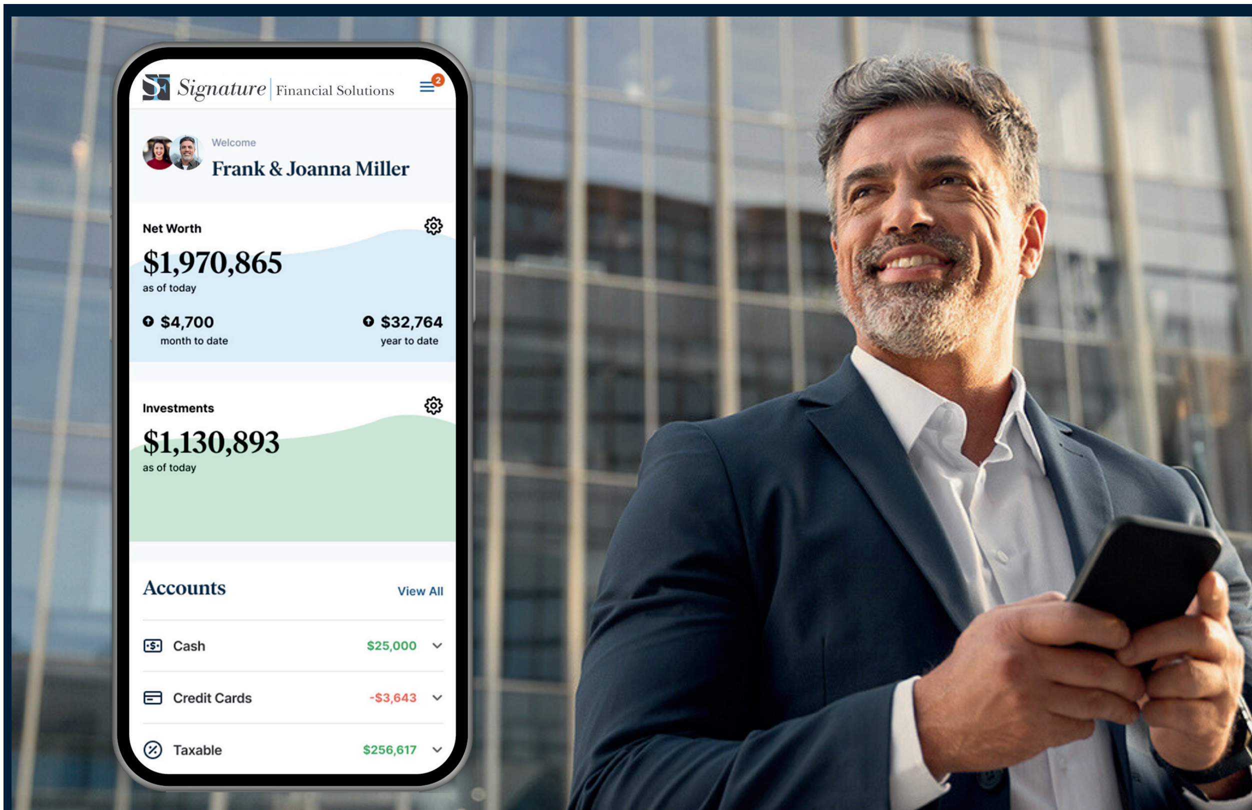
Based on survey data of small-business owners from research conducted by third-party firms (including Equitable and SCORE) comparing outcomes for those who use financial professionals versus those who do not. Results are based on self-reported information, may not reflect the experience of all business owners, and are not a guarantee of future results. This material is for informational purposes only and is not intended as individualized business, tax, or investment advice.

Business Solutions

Helping business owners protect what they've built and plan for what's next.

- **Retirement Plans** – Design and support for 401(k), 403(b), 457, SIMPLE, and other employer-sponsored plans.
- **Buy/Sell Planning** – Strategies to help fund and structure buy/sell agreements between partners and owners.
- **Key Person Insurance** – Protection against the financial impact of losing a key employee or owner.
- **Executive Benefits** – Customized benefit packages to help attract, retain, and reward top talent.
- **Succession Planning** – Guidance to help you transition or exit your business on your terms.

Start Your Financial Journey
Whether you're planning for retirement, growing a business, or simply trying to make smarter decisions with your money, we're here to help you move forward with clarity and confidence.



Your Portal in the Palm of Your Hand

Signature
Financial Solutions

Independent advice.
Personal relationships.
Committed to your Best Interests.

Offices & Contact

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Affiliated Offices

Boca Raton | Clearwater | Dunedin | Lakeland | Naples | Palm Beach Gardens | Panama City Beach | Port St Lucie | Richmond, VA | Rockledge | Sebring | St. Petersburg | Sunrise | Tampa The Villages | Winter Garden

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