CAPABILITY STATEMENT

Where relationships come first.

Group Benefits | **Financial Education** | **Financial Planning**

Core Competencies

- Customized Group Benefits and Voluntary Benefits solutions
- Solidification of financial strength of diverse suppliers
- Detailed guidance and financial empowerment trainings and-customized programs for senior leadership
- Investment Management
- Financial planning and advisory services

Differentiators

- We offer holistic financial planning, with a deep knowledge in both insurance and investment strategies.
- Secured over $600 million in death benefits within the Atlanta area alone.
- Management of over $85 Million dollars of investments.
- Over 25 years in business
- Registered Investment Advisors
- Founder/CEO, Meredith Moore has delivered financial education presentations to Fortune companies, major law firms, and professional associations, including a TEDx Women talk on financial empowerment.
- Work closely with 400+ families and businesses
- Over $200,000 of monthly individual disability insurance in place

ARTISAN
Financial Strategies LLC

1125 Cambridge Square, Suite C
Alpharetta, GA 30009
POC: Meredith Moore, LUTCF, CLTC
Office: 770-587-0281
mmoore@artisanfsonline.com
http://www.artisanfsonline.com

Company Data:

Certifications:
WBE - WBENC Certified
Small Business

Licenses:
NYLIFE Securities LLC,
Member FINRA/SIPC

NAICS:
523930, 524113, 524114, 525110, 525120, 711510

UNSPSC:
84000000, 84130000, 80111502, 84131801, 84131802, 60105401, 64122000, 64102003, 64122003, 64122005

UNSPSC code IDs:
72061,420,72955,76069,76070, 416,75084

Key Personnel:
Meredith Moore: Founder/CEO

Experience:
Over 25 years of experience serving a diverse portfolio of clients.

certified WBENC WOMEN'S BUSINESS ENTERPRISE

EMPLOYEE BENEFITS

Where relationships come first.

Group Benefits

Your Group Benefits Consultant will assess your specific needs and meticulously compare premium rates and benefit options from the industry's most reputable insurance carriers. As we represent all major insurers, your AFS Consultant can tailor and craft a benefits package that perfectly aligns with your requirements.

401(k) / Retirement Plans

If you're considering setting up a 401(k) or Retirement plan with NYLIFE Securities' Platform Providers for your company, or if you'd like to reassess your current offerings, our seasoned 401(k) Specialists are here to help. They will take the time to thoroughly evaluate your options and guide you in securing the Retirement Plan that best aligns with your company's needs.

Individual/Family Benefits

If you or your employees need to explore individual insurance options, our experienced Individual Account Representatives are ready to assist. Specializing in Individual Health, Life, Disability, and Dental plans, they will answer your questions and compare a range of insurance plans. Additionally, they can provide support to new or recently terminated employees in setting up a temporary health plan until their new coverage takes effect.

Group Benefits
For businesses of all sizes
NAICS 524113, 524114, 525110, 525120

- 401k, retirement and pension plans
- Health, disability and long-term care insurance
- Individual / Family Benefits
- Voluntary Benefits

Voluntary Benefits

Traditionally, voluntary benefits are provided to employees through payroll deductions. AFS offers standard benefits such as life, short-term and long-term disability, dental, vision, medical supplements, cancer, long-term care, and critical care insurance. Additional options include legal plans, pet care, and lifestyle discounts. This service enhances your compensation package by offering affordable and diverse benefits tailored to different employee needs, enabling you to expand benefits without impacting your budget.

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FINANCIAL PROGRAMMING

Where relationships come first.

Financial Programming

Financial Programming
For Senior Leaders and Diverse Suppliers
NAICS 523930

Program 1: Top Financial Mistakes Entrepreneus Make and How to Avoid Them

Designed for WBE's and Diverse Suppliers

The financial health of your diverse suppliers directly affects their sustainability as on going supplier. The way monies, cash flows and balance sheets are structured are very different for entrepreneurs vs. senior leaders or high earning W2's. This program is designed to go through the Top Financial Planning Mistakes Entrepreneurs Make and how to avoid them. There is also an emphasis on business exit and succession, in order to properly educate, even the most sophisticated suppliers on long term financial success in their business.

Solidification of financial strength of WBE's and diverse suppliers

- Stronger, faster, better
- Are you finding vendors dying out from not being able to manage their business finances?
- Before you order from a diverse supplier, you should want to know that they have a stable financial plan and knowledge of their business finances, in order to create a mutually success long-term partnership

Program 2: Top Financial Mistakes Senior Leaders Make and How to Avoid Them

Designed for Women in Senior Leadership

While many of your senior leaders work with professionals outside of the company, it's rare that they are getting detailed guidance and financial empowerment programming, especially as it may pertain to tax, equity compensation, estate planning and to strategically make sure they are ok as they look towards big life decisions. This program has been implemented to senior leaders at other Fortune 500 companies and provided value that was not available via financial services suppliers. It's more nuanced and addresses more sophisticated topics that typically aren't addressed with the company.

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Financial Planning

Artisan Financial Strategies is your trusted partner in fee-based financial planning for senior leaders. We start by understanding your life, family, and aspirations, then guide you through financial planning, from investment basics and insurance to estate planning and tax strategies. For organizations providing stipends for senior leaders to hire a fee-based advisor, we offer customized planning to protect what matters most and turn your goals into reality. Trust Artisan Financial Strategies to elevate your financial well-being.

Advisory services include:

Protection Planning: We help identify and mitigate financial risks, ensuring you have the right insurance and strategies in place to protect your assets and income.

Estate Planning: We help you create a plan that ensures your assets are distributed as you wish, while minimizing taxes and legal complications for your heirs

Retirement Analysis and Projections: We design retirement plans that project your future income needs and guide you in choosing the best strategies to meet them.

Tax Analysis: We incorporate tax-efficient strategies into your plan, optimizing income and investments to minimize your tax burden now and in the future.

Financial Planning
For Senior Leaders
NAICS 523930

What-If Scenarios/Stress Testing:
We stress test your financial plan with various scenarios to ensure it can withstand market fluctuations and unexpected life events.

Cash Flow Analysis:
We analyze your income and expenses in detail, helping you manage cash flow to achieve your financial goals today and over the long term.

Need Investing Advice?

Along with Financial planning, Artisan Financial can design a diversified investment portfolio tailored to your risk tolerance, financial goals, and timeline, aiming to maximize returns while managing risk.

Contact us today for a consultation.

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