

# RFG Extended Family

RFG understands that in this day and age our clients seek a financial partner who can provide or refer services beyond our normal scope of work. We collaborate with a number of professionals including attorneys, accountants, health insurance agents, mortgage brokers, and business brokers. Below is a list of our extended family and their services.

Please contact us to become an RFG Extended Family member.



## Tax Specialist | **Cindy Rose**

Since 2012, she has been working with individuals and small business clients to prepare their tax returns. Cindy has made it a priority to help taxpayers of all types, from teenagers filing their first return to families with children to retirees, plan and prepare for life changes through the lens of how income tax impacts their financial situation.

For the past 5 years, teaching income tax to preparers became a passion of Cindy's, as well. She achieved a degree in Business Administration from Tennessee Tech.



## Estate Planning | **Shawn Gupta**

Shawn Gupta, a lifelong resident of Cincinnati, focuses his legal practice in the areas of estate planning and estate administration. He has worked in these fields almost exclusively since 2007. Mr. Gupta assists his clients in designing and implementing custom estate plans which allow them to maintain control of their finances and healthcare decisions both during periods of incapacity and after their passing. Through carefully crafted estate planning, Shawn enables his clients to efficiently transfer assets upon their deaths while also protecting the inheritances of their loved ones.



## Mortgage Services | **Kevin Ary**

Kevin Ary has over 25 years of personal mortgage industry experience and has owned his own mortgage brokerage company, Franklin Financial Group, for over 21 of those years.

Franklin Financial Group, Inc. is a mortgage brokerage located in Anderson Township, a suburb of Cincinnati, Ohio. They have been operating and originating mortgages in Ohio, Kentucky and Florida since 1999. To date, they have originated over \$289 Million Dollars in mortgages.



## Health Insurance | **Kevin Daly**

Kevin started his insurance career at David M. Wallace & Co. while he studied at the University of Cincinnati. After graduating from UC, he continued in the industry as an independent health insurance broker. Kevin is a dedicated agent who always puts his clients first. His 35 years of experience allow him to provide an easy and seamless process for his clients.

He is committed to helping individuals and groups achieve customized plans. Kevin is a Graduate of the University of Cincinnati Licensed as a Independent Life and Health Insurance Broker (CLU,RHU, REBC)



## Business Intermediary | **Phil Eleson**

Phil Eleson is an Accredited Business Intermediary (ABI) who has over 20 years of professional experience with a variety of companies from small startup businesses to Fortune 500 companies. For 10 years of Phil's career, he has owned multiple businesses including those which he purchased and sold. He understands firsthand the analysis and emotion involved in business transfers and is passionate about helping his clients manage the process to ultimately achieve their goals.

Phil grew up in Louisville, KY and attended Western Kentucky University earning a B.S. in Marketing. While working in the steel industry Phil returned to school and earned his M.B.A. from DePaul University.