

# RFG Extended Family Workshop

## September 28th | 2 pm - 6 pm

Members of the RFG Extended Family will be available to meet in person or virtually.

Click the link below to schedule a 15-minute meeting with one or more of these members.

### EVENT REGISTRATION



#### **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 is an Accredited Business Intermediary (ABI) who has over 20 years of professional experience with a variety of companies from small start-ups to the Fortune 500. Whether it's a franchise opportunity, merger and acquisition consulting, equipment appraisal, or site selection for commercial real estate, Phil will provide the confidence and expertise needed to partner with you on your business venture. Phil has owned multiple businesses including those which he purchased and sold and understands firsthand the analysis and emotion involved in business transfers. Phil is passionate about helping his clients manage this complex process to achieve their goals. Feel free to connect with Phil directly or with anyone on your team here at RFG to discuss your business valuation needs.



#### **Social Security | Dennis Heywood**

Denny's career with Social Security provides an in-depth, working knowledge of the Social Security Administration's internal organization and processes. An expert in all phases of SSA programs: retirement, survivor, disability and Medicare, Denny has expertise with the complex Social Security regulations based on more than 40 years experience.

**Location: 7426 Jager Ct. Cincinnati OH 45230**