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Affluent Families Achieve Peace of Mind Through A Total Wealth Solution

M Advisory Group

Even though the volatility of today's economic market is unprecedented, one long-proven strategy consistently places the family in the best place to reach its goals. "Take a comprehensive, disciplined approach that addresses your entire financial life," explains Donald H. Mehlig, a nationally recognized leader in the financial services industry and founder of M Advisory Group in Torrance, Calif. "People who have been accumulating wealth over the years commonly find they have a piecemeal approach to their plan. They own products and investments that may no longer serve them well and, at the same time, important considerations have fallen through the cracks."

Total Wealth Solutions™

Providing objective financial advice to affluent individuals, families and business owners is the focus of M Advisory Group. "We take clients through a systematic process to identify and document what is most important to them," explains Executive Vice President Anne Trinh. "It starts with the Family Vision and from that, a total picture of specific goals, needs and timelines is then developed, called the Total Wealth Road Map™, which is the centerpiece of our process. We also work with our clients' other trusted professional advisors to design, implement and administer customized, results-driven solutions to meet targeted goals."

The Total Wealth Solutions™ is a time-tested process to maximize clients' clarity and make their visions come to life, including multigenerational planning, says company President J. Daniel Vogelzang. "Our 50 years of success is evidence we are client-centric. We explore all options for each client situation so that we can provide the most appropriate recommendations. As an ancillary service, before a client ever engages us in the Total Wealth Solutions™ process, we offer complimentary comparative analyses and unbiased second opinions on their investment holdings and insurance portfolios."

INTEGRITY, EXPERTISE, LEADERSHIP

M Advisory Group executive team is, from left: Dennis Branconier, Senior Vice President; firm principals-Donald H. Mehlig, Chairman and Founder; Anne Trinh, Executive Vice President; J. Daniel Vogelzang, President & Executive Director.

The leaders of M Advisory Group participate and partner with a network of top professional advisors in LA and Orange County. In addition, believing wealth can be mobilized for the greater good, they are also actively involved in philanthropic and charitable work within the South Bay community.

M Advisory Group brings clients an uncommon blend of personal attention by knowledgeable experts with the strength and resources of the larger financial services firms. It has assembled a team of like-minded, knowledgeable professionals who hold all relevant securities licenses including certifications such as CFP®, ChFC and CLU.

"We are a boutique firm committed to lifelong service," says Mehlig. "Part of our 'value add' proposition is that we are a member and shareholder of M Financial Group, a consortium of 135 independent professional financial services firms in the U.S. The 'Power of M' is our ability to negotiate with nationally known financial institutions for product and pricing exclusivity that no one else in the industry has. That's especially important for our clients, whose needs are often complex and involve both family and business concerns."

M ADVISORY GROUP
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