ADVANCED

CAPITAL GROUP

Advanced Capital Group at a Glance

The vision to grow together

ADVANCED CAPITAL GROUP INTEGRATES A CULTURE OF INNOVATION WITH CUSTOMIZED FINANCIAL STRATEGIES TO DRIVE PROVEN RESULTS FOR OUR PARTNERS.

Why Advanced Capital Group?

As an award-winning consulting firm and Registered Investment Advisor (RIA), our expert team uses a proactive and collaborative approach that enhances financial results for organizations and individuals.

INDEPENDENT ADVICE AND MANAGEMENT

As fiduciaries, our fee-only compensation helps to minimize conflicts-of-interest and ensures you receive unbiased advice that puts your interests first.

COMPREHENSIVE APPROACH

Served by a team of experts, you'll receive holistic insights that are cultivated in our creative and collaborative culture.

TAILORED SOLUTIONS

Fueled by proprietary processes and in-house research and analysis, you'll benefit from solutions experts design uniquely for you.

WE CAN HELP YOU:

- Reduce personal and business fiduciary risk
- Maximize ROI by reviewing services and fees
- Empower yourself or your participants through actionable education
- Provide investment solutions to meet income, growth and risk tolerance goals
- Implement industry best practices and provide strategic planning
- Alleviate your workload so you can devote your attention elsewhere

A team of experts

Our experienced consultants advise, based on decades of experience navigating regulatory and market cycles. And our fee-only compensation means we aren't influenced by anything other than your financial well-being.

A Spectrum of Financial Services

INSTITUTIONAL CONSULTING

Lay the foundation for retirement plan, endowment, foundation and tribal trust success with strategic design, industry best practices and customized investment advice to help you reach your goals.

- Collaborative strategic planning and goal setting
- Plan design analysis and fee benchmarking
- Investment research and due diligence process
- Investment committee best practices
- Plan governance and fiduciary oversight
- Risk tolerance analysis based on plan demographics
- Custom risk and age-based model portfolios
- Regulatory and compliance updates
- Regular investment reviews
- 3(21) investment advice and 3(38) investment management fiduciary services
- RFP and RFI management

PARTICIPANT FINANCIAL WELLNESS SERVICES

Give participants the education and tools they need to feel confident about their own financial futures. This is a meaningful benefit offering to maximize participation in your plan and retain top talent.

- Education planning and collaboration with recordkeeper
- Tailored communication strategies
- Custom group education online or in person
- Mobile-friendly online learning platform
- Financial topics for every life stage
- Marketing and program support
- Customizable to employer benefit package
- Proprietary scorecards to analyze impact
- In-depth personal financial advisory with a CFP®

INSTITUTIONAL INVESTMENT MANAGEMENT

Preserve and grow your organization's investment assets with a customized and comprehensive approach to your portfolio. Our unbiased and experienced investment managers establish portfolios that continuously work to achieve efficient risk-adjusted returns while holding safety of principal paramount.

- Exposure and diversification through use of strategic asset classes
- Competitive procurement as a fiduciary with no inventory of securities to motivate recommendations
- In-house monitoring and managing of credit risk with best-in-class reporting
- Asset / liability management
- Liquidity / cash management

INDIVIDUAL INVESTMENT MANAGEMENT

Rely on complete and personalized financial advice and investment planning that considers more than retirement assets.

- Personalized goal-based financial advice with a Certified Financial Planner™ (CFP®)
- Unbiased insights from a fiduciary advisor with no conflicts-of-interest
- Custom strategies for investment portfolio management
- Portfolio rebalancing and quarterly reporting
- Minimal initial investment requirement

Advanced Capital Group is an award-winning consulting firm and Registered Investment Advisor (RIA) based in Minneapolis, MN. Our expert team uses a proactive and collaborative approach that enhances financial results for organizations and individuals, with a specific focus on Institutional Consulting, Participant Financial Wellness Services, Institutional Investment Management and Individual Investment Management. Additionally, Benefits & Risk Consulting is provided to our clients through a strategic partnership.

We are passionate about fostering creative ideas and exploring new opportunities for our clients. Contact us to learn how a customized relationship can help you succeed.

PUT OUR VISION TO WORK FOR YOU

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