

COMPARE THE BENEFITS

BENEFITS

**OGDEN
C. PAGE**

**OTHER
ADVISOR**

Is your financial representative a PhD /Philosophy Doctor/ in Business Administration?

YES

Does your financial representative have an MBA /Master of Business Administration/ degree from a prestigious school like UCLA?

YES

Is your financial representative enrolled to practice before the Internal Revenue Service? Is he or she an EA /Enrolled Agent/?

YES

Is your financial representative a CPA /Certified Public Accountant/?

YES

Is your financial representative a PFS /Personal Financial Specialist/?

YES

Is your financial representative a CFP /Certified Financial Planner/?

YES

Is your financial representative a Certified Divorce Financial Analyst (CDFA) who specializes in collaborative law?

YES

Is your financial representative a CCFC /Certified Cash Flow Consultant/?
Is your financial representative a loan and mortgage broker/consultant?

YES

Is your financial representative a CVA /Certified Valuation Analyst/?

YES

Is your financial representative a CWPP /Certified Wealth Preservation Planner/ and a CAPP /Certified Asset Protection Planner/?

YES

Is your financial representative also a Notary Public in California?

YES

Is your financial representative licensed in insurance (life and fire/casualty) in California? Does he or she hold Series 7, Series 63, and Series 65 licenses?

YES

Does your financial representative provide computerized accounting and income tax preparation, audit representation, mediation and tax resolution services with the various taxing authorities?

YES

Is your tax and financial representative a small business expert?
Does he or she have a passion for solving problems and providing innovative strategies to the small business owners? **YES**

Does your financial representative have experience in Small Business Administration, minority and women business enterprise matters? **YES**

Does your financial representative provide "triple-check" accuracy, attention to detail, comfortable informal setting, and friendly expert assistance? **YES**

Is your financial representative available for consultation at any time?
Does he or she have a fair and reasonable fee structure? **YES**

Does your financial representative provide a "one-stop" boutique firm to offer strategies to your financial management needs? **YES**

Is your financial representative a respected lecturer and author?
Is he or she listed in the National Directory of Who's Who in Executives and Professionals in America? **YES**

OGDEN C. PAGE

EA, CPA, PFS, CFP, CDFA, CCFC, CVA, CWPP, CAPP, MBA, PhD
"YOUR SMALL BUSINESS EXPERT"

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