



239-908-4030



## Specializing in Wealth Preservation & Tax Planning

Helping you plan a bright future!



## Our Mission Statement:

To inspire our clients to take a proactive approach to true wealth management through experiencing a real relationship with a financial firm unlike anything they have had before; whereby they receive the best, unbiased counsel and unparalleled customer service.



## A Proven Approach

Utilizing a combination of advanced insurance planning, strategic tax elimination and investment options, we focus on developing unique retirement solutions, that will offer tremendous growth, while providing complete safety in preservation of wealth and capital for our clients.



## Why Us?

Our team of professionals are fully credentialed and Certified Financial Fiduciaries, with extensive experience and knowledge in the solutions they offer, as well as the expertise to utilize and maximize benefits and protection for our clients.

**📍 GET DIRECTIONS**

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## CONTACT US

It is never too early to get started on your retirement planning. Tell us more about your goals, and we will get you started on a financial plan to achieve them.

# Atlantic Asset Advisors

Sunshine Professional Center, 9220 Bonita Beach Rd Ste 108, Bonita Springs, Florida  
34135

(239) 908-4030

## Hours

Monday through Friday: 8:30am - 5pm

**GET STARTED TODAY**

## OUR PARTNERS



"Good Faith, Care and Loyalty to Our Client's Best Interest"



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