FREE FINANCIAL REVIEW





FT 400 Ranking March 2017

We offer a complimentary "Get Acquainted" meeting to describe our services, and to see if our services are right for you.

GET IN TOUCH

Securities offered through Charles Schwab & Co., Inc. Member <u>FINRA/SIPC</u>. Copyright © 2019 Magnus Financial Group | Powered by <u>AdvisorFlex</u>

280 Park Avenue, 25th Floor West, New York, NY 10017 | Phone: 800-339-1367 | Email: service@magnusfinancial.com

Active clients will receive account statements directly from their qualified custodian at least quarterly. Statements should detail all transactions during the period. If you have any questions or are not receiving account statements at least quarterly, please contact us. If at any time you experience any changes in your investment objectives or risk tolerance, please contact us to determine if changes to your investment elections are necessary.

This website is provided by Magnus Financial Group LLC ("Magnus" or the "Firm") for informational purposes only. Investing involves the risk of loss and investors should be prepared to bear potential losses. Past performance may not be indicative of future results and may be impacted by events and economic conditions that will not prevail in the future. No portion of this commentary is to be construed as a solicitation to buy or sell a security or the provision of personalized investment, tax or legal advice. Certain information contained herein this is derived from sources that Magnus believes to be reliable; however, the Firm does not guarantee the accuracy or timeliness of such information and assumes no liability for any resulting damages.

Magnus is an SEC registered investment adviser that maintains a principal place of business in New York. The Firm may only transact in those states which our notice is filed or qualifies for a corresponding exemption from such requirements. View Magnus Privacy Notice for more details. For information about Magnus's registration status and business operations, please consult the Firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov

Michael S. Schwartz is primarily licensed in New York and may be licensed in other states. AR License # 444300, CA License # 0H02771

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. Advisor is featured in Worth® 2018 Leading Wealth Advisors™, a special section in every edition of Worth® magazine. All persons and firms appearing in this section have completed questionnaires, have been vetted by an advisory group following submission by Worth®, and thereafter paid the standard fees to Worth® to be featured in this section. The information contained herein is for informational purposes, and although the list of advisors presented in this section is drawn from sources believed to be reliable and independently reviewed, the accuracy or completeness of this information is not guaranteed. No person or firm listed in this section should be construed as an endorsement by Worth®, and Worth® will not be responsible for the performance, acts or omissions of any such advisor. It should not be assumed that the past performance of any advisors featured in this special section will equal or be an indicator of future performance. Worth®, a publication of the Worth Group LLC, is a financial publisher and does not recommend or endorse investment, legal or tax advisors, investment strategies or particular investments. Those seeking specific investment advice should consider a qualified and licensed investment professional. Worth® is a registered trademark of the Worth Group LLC.

Regarding client privacy, please view the following Magnus Privacy Notice