

[Capital Formation Group, Inc.](#)

[Home](#) [The CFG Approach](#) [Who We Are](#) [The Work We Do](#) [Processes](#) [The Latest](#) [Community Engagement](#)
[Careers](#) [Contact Us](#)

Strategic & Competitive Advantage for Our Clients

[News: Wellesley Wealth Advisor John Williams Co-Authors New Book to Transform Policyholders' Experience with Life Insurance . Read More >>](#)

CFG was founded on the premise that working with clients and their financial futures should be about clarifying and solving problems via a process of sound planning. This process should be about completely aligning with clients, their families, and their needs. [Learn more about Capital Formation Group >>](#)



Remembrance

TRUST

When choosing a partner to manage your family's financial future, it is the single most important aspect to consider. At Capital Formation Group, Inc. we have spent the last thirty years aligning ourselves with our clients' needs in order to build solidly grounded, long term financial plans.

With an emphasis on limiting risk, what we deliver is a comprehensive array of financial, estate, insurance, investment and fiduciary services. What our clients receive is acquired wisdom, common sense and a foundation of trust.

Home

[Learn about what we do and why you should choose us as your financial partner.](#)

Our People

[All about our staff and the work they can do for you and your family.](#)

Services

[Read about our history and the driving forces behind Capital Formation Group.](#)

Processes

[The processes we use to ensure your financial well-being.](#)

The Latest

[The latest developments around Capital Formation Group.](#)

Philanthropic

[Charities and non-profit organizations we support.](#)

62 Walnut Street, Wellesley, MA 02481 - 781.237.0123 - info@capformgroup.com.



© 2019 Capital Formation Group, Inc. - All rights reserved. [Member SIPC](#)

* Services Offered Through Valmark Securities, Inc. A Registered Broker/Dealer, Member FINRA/SIPC - 130 Springside Drive, Suite 130, Akron, Ohio 44333 (800) 765-5201. Capital Formation Insurance Agency, Inc. and Capital Formation Group, Inc. are separate entities from ValMark Securities, Inc. Investment Advisory Services Offered Through Capital Formation Group, Inc. Third party posts do not reflect the views of Valmark and have not been approved by them prior to posting. <http://www.finra.org/>