



aid to **FINANCIAL** navigation

## Our Mission

To offer independent, ethical and conflict free investment consulting services designed to ensure that our clients achieve their financial





At ATON FINANCIAL LLC, we bring a fresh perspective on investment advisory and financial planning services to our clients in Puerto Rico and throughout the United States. As an RIA (registered investment advisor), we have a fiduciary responsibility to work in our clients' best interests, and we do exactly that.

Our experienced advisors offer independent, ethical and conflict-free investment consulting services designed to help our clients achieve their financial goals. Serving all ages, backgrounds and professions, we would love to help direct you on the best financial path for your unique situation.

**TRANSPARENT,**  
conflict-free advice you can trust





Our Values

Our Team

Alliances

## Transparency That Brings Peace of Mind

Unlike brokerage firms, which are held to a lesser regulatory standard and partial to proprietary products, we at ATON FINANCIAL are free to choose investments and resources that best meet your objectives. We are an independent firm, free from potential conflicts of interest or biased advice that can arise from misaligned incentive or commission-based structures.

## Tailor-made Solutions. Smarter Investments. Meaningful Results.

Because we know no two clients are alike, we offer reasonable investment and asset management recommendations based on a thorough understanding and analysis of your individual financial circumstances, risk profile, priorities and goals. We listen and work with you to trace a financial plan that allows for the active accumulation, preservation and perpetuation of your assets.

## A Straightforward Approach.

### WE DO:

Align our interest objectives solely with those of our clients

Understand individual clients' needs and act in their best interest

Search for optimal strategies to improve client performance

Adhere to a "best-of-breed" philosophy when building portfolios





Receive compensation from anyone other than our clients -- we believe that there would be an inherent conflict of interest

Limit ourselves to proprietary platforms, investment products or research

Allow for misaligned incentive or commission structures that can affect output

Our **CLIENTS'** interests come first. Period.

Financial Planning

Investment Management





## PROVIDING a ROAD MAP ON WHERE TO GO

Financial planning is the cornerstone of what we do, serving clients of all backgrounds to provide sound financial advice on how to best handle educational costs, retirement and estate plans, and more. Without financial planning, clients are adrift and find they have to change their investments and tax strategies constantly.

When you work with ATON FINANCIAL, you can expect professional advisors who spend a month or two asking the right questions and learning your entire financial story before creating a plan and recommending investments. It may sound simple, but most of the financial industry doesn't conduct business this way, and your finances can suffer as a result.

Tailor-Made **SOLUTIONS**  
**SMARTER** Investments  
Meaningful **RESULTS**





## Helpful Information Straight to Your Inbox

Clients of ATON FINANCIAL receive our monthly newsletter containing important and helpful information regarding their finances with articles from established news sources such as Barron's and MarketWatch. Our newsletter is customized and segmented to clients by institutions and professions they share. We also send special updates for breaking news. Sign up below to get on our mailing list and indicate you want to receive our newsletter.

NAME

EMAIL

PHONE

MESSAGE

Send





## Getting Started is **EASY**

While every first conversation is different, you should expect to cover some general information and get a sense of what it's like to collaborate with us.

To help prepare for an initial meeting with our team, you should have a basic idea of your current financial picture and financial goals. How are things now? Do you have any concerns? What do you hope to accomplish in the next few years and longer term? We want to know! Fill out the form below, and let's talk.

NAME

EMAIL

PHONE



Send



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