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TRUSTED, ACCESSIBLE, GENUINE, COMPETENT, CARING

The Capital Advisory Group Advisory Services is a Registered Investment Advisory firm that handles institutional retirement plans and serves retired families & business owners, addressing nearly every aspect of asset management and planning.

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FOR INDIVIDUALS

FOR COMPANIES

401K

**“OUR MISSION IS SIMPLE, TO PROVIDE PERSONALIZED INVESTMENT
ADVICE THAT HELPS MINIMIZE YOUR FINANCIAL CONCERNS AND
MAXIMIZES YOUR ASSET PROTECTION.”**

The Capital Advisory Group Advisory Services is an asset manager that helps guide wealth accumulation and management. Our team helps executives, retirees, and business owners with financial planning, asset management, tax guidance, risk mitigation, and estate planning. We help clients create wealth by analyzing income; cash flow and taxes with the goal of each becoming great savers. We scrutinize what can possibly derail the plan. Finally, we help clients grow into investors with realistic expectations, strategies to reduce the impact of market downturns, and plans to meet their future income and asset objectives.



19 WAYS WE ARE DIFFERENT

You need an advisor that's available on your terms. We live in a society that's ever-changing and rapid-paced. Decisions are made quickly. Can you really wait until next week to meet with your financial advisor? The Capital Advisory Group Advisory Services understands that some financial decisions can't wait a week. You need answers fast.

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WHY US

Our Firm quietly manages \$361 million for institutions and families. We are dedicated to helping successful professionals, retirees & business owners achieve, grow, sustain and protect wealth. We pride ourselves on being client-centered and Minnesota-based.

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HOW WE INVEST

We utilize cutting-edge technology to help you stay in control of your collective financial picture and promote salient methods for reaching your goals. We understand that offering a competitive and truly beneficial retirement plan for employees is vital to a company's ability to retain valuable talent.

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Email

Phone

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Contact

The Capital Advisory Group Advisory Services

Office: 952-831-8243

Toll-Free: 800-548-1820

Fax: 952-831-5563

5270 West 84th Street

Suite 310

Bloomington, MN 55437

bmachtig@machtig.net

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