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WEALTH MANAGEMENT

Time is money, and managing your wealth can be overwhelming. Let us help with your assets so you can spend more time enjoying them.

[READ MORE \(HTTP://WWW.CROSSFINANCIALSERVICES.COM/SERVICES\)](http://WWW.CROSSFINANCIALSERVICES.COM/SERVICES)

RETIREMENT INCOME PLANNING

With creative investment strategies and options we can help preserve and grow your hard earned money.

[READ MORE \(HTTP://WWW.CROSSFINANCIALSERVICES.COM/SERVICES\)](http://WWW.CROSSFINANCIALSERVICES.COM/SERVICES)

INSURANCE SERVICES

Specializing in preparing you to handle the unexpected with Life, Long Term Care and Disability Insurance.

[READ MORE \(HTTP://WWW.CROSSFINANCIALSERVICES.COM/SERVICES\)](http://WWW.CROSSFINANCIALSERVICES.COM/SERVICES)

COLLEGE PLANNING

Rising education costs require a forward-thinking plan. Cross Financial can help you prepare for one of life's biggest investments.

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ABOUT CROSS FINANCIAL

Cross Financial offers comprehensive services for our clients. We strive to build a reputation that thrives on a high-level of customer satisfaction. When our clients are truly confident in their financial stability, we have done our job. From helping to grow your wealth to planning for your family's future, Cross Financial strives to be one of Phoenix's most respected names in financial services.

Whether you are experienced or are just starting to manage your portfolio, Cross Financial can help you pursue your goals.

OUR FINANCIAL ADVISEMENT PROCESS

Over the 13 years Cross Financial has been in business, we have established a six-step process to stimulate success. We hope you'll join us on that journey:

Establishing
Relationship



ESTABLISHING RELATIONSHIP

Gathering Data
and Goals

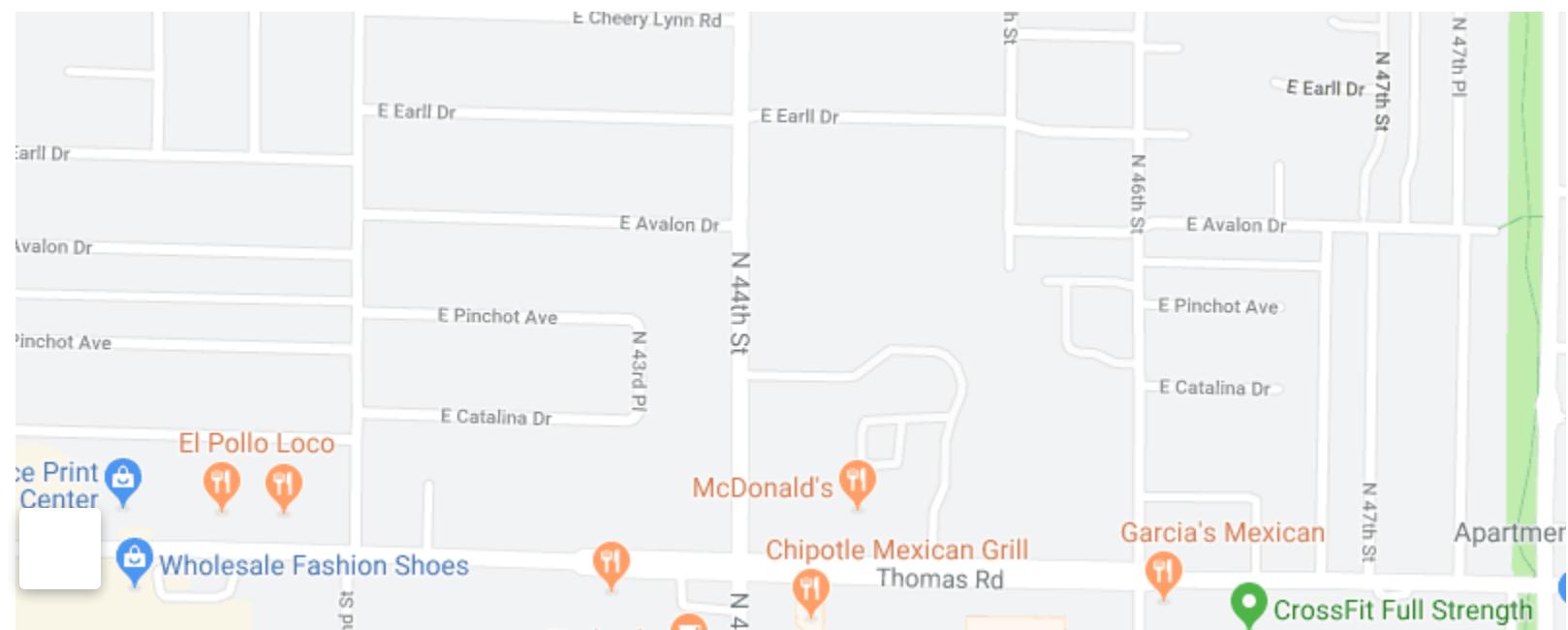
It all starts with trust. Our most important goal is to understand your needs so we can fulfill them. Our strongest relationships have lasted since we founded Cross Financial. Our goal is to develop a level of trust with our clientele that will provide them with great confidence.

Evaluating
Financial Status

Review our
Recommendations

Setting Your Plan to Action

Monitoring Portfolio Progress



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