



AdvisoryHQ Top Ranked 2016

Rock-solid Commitment to Serving Your Best Interests

We know what happens behind the scenes on Wall Street.

20 years ago, we broke away from the big financial institutions, assembled a FinancialTeam of experts, and committed our careers to making sure it doesn't happen to you.

video length: 2 minutes 31 seconds.

Welcome to FirsTrust

Expert financial, tax, retirement, estate & investment services
... the way **we** would want if **we** were the clients.

7 TRUTHS about serving your BEST interest:

1. TRUE OBJECTIVITY

Unlike most firms, we believe **your** best interest is served by Fee-Only Advisors who don't also receive [incentive compensation](#) from the things they advise you to do.

2. TRUE EXPERTISE

We believe **knowing** what's in your best interest requires the [wisdom](#) that comes from many years of successfully navigating the same roads you are traveling today.

3. TRUE INDEPENDENCE

We believe finding what's in your **best** interest requires an advisor to look **beyond** his [employer's menu](#): to evaluate and compare investment offerings from anywhere and acquire the most appropriate choices for your specific objectives.

4. TRUE VALUE

We believe it's in your **best** interest when your financial advisor is [paid to get results](#) - not chase new sales.

5. TRUE CUSTOMIZATION

We believe your **unique** interests are best served by an [actual expert](#) instead of a Jack-of-all-trades, a [custom-tailored plan](#) instead of a "rule-of-thumb", and a sound [investment process](#) instead of a one-size-fits-all portfolio .

6. TRUE TRANSPARENCY

We believe it's in your best interest for unnecessary expenses and conflicts of interest to be **eliminated**, not "disclosed" in [fine-print disclaimers](#).

7. TRUE ADVOCACY

We believe your financial interests should be **protected**, and having a [trusted Advocate](#) in your corner to help fend-off financial predators and misguided sales pitches can be priceless.

How Risky Is Your Portfolio?

A Nobel Prize-winning risk analysis helps engineer an investment portfolio to achieve your goals with a 95% probability range.

video length: 83 seconds

Cutting Edge Technology Puts Everything At Your Fingertips

Click here to see our amazing tools for organizing, collaborating, tracking and monitoring your entire financial profile.

video length: 2 minutes 17 seconds

Whether accumulating wealth or already [world-famous wealthy](#), we've been the trusted Financial Advisors of discerning families across Florida & around the globe.

Click to see how we would approach YOUR financial goals.



Wealth
Management



Investment
Services



Trust & Estate
Management

Come see the difference.

As with any quality service firm, the difference is our people. Each of our Advisors has 20 to 30+ years of experience, an advanced degree and/or specialist certification, and a clean disciplinary background. www.adviserinfo.sec.gov

Instead of attending in-house sales training and product vendor conferences, our Advisors continue their professional education each year through programs conducted by reputable sources such as The University of Miami School of Law, Harvard Business School, and The American Bar Association.

Our service Team is comprised of seasoned professionals; each providing nearly 20 years of competent service to our clients.



NAPFA-REGISTERED
FINANCIAL ADVISOR

Not "Fee-Based". A variety of fancy titles have been invented to make some advisors appear more objective (such as "fee-based" which actually means fees+commissions). We are a TRUE FEE-ONLY Fiduciary Advisor Firm headquartered in Daytona Beach, FL with client service offices located throughout the state. Our advisors have *verified* their experience and objectivity through Membership as Registered Financial Advisors with the National Association of Personal Financial Advisors; a distinction of financial advisors who affirm by sworn Fiduciary Oath to eliminate the conflict of interest that is created by commissions, incentives and other third party compensation.

www.NAPFA.org



Comprehensive Financial Planning: Our Daytona Beach, FL office is home to experienced professionals with the Certified Financial Planner™ designation; the premier credential of the financial planning industry. CFP® professionals must pass the comprehensive CFP® Certification Examination, pass CFP Board's *Fitness Standards for Candidates and Professionals Eligible for Reinstatement*, agree to abide by CFP Board's *Code of Ethics and Professional Responsibility* and *Rules of Conduct* which put clients' interests first and comply with the *Financial Planning Practice Standards* which spell out what clients should be able to reasonably expect from the financial planning engagement. The Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™.



Investment Portfolio Management: FirsTrust's Chief Investment Officer holds the highest distinction in the investment management profession – the CFA® designation. Becoming a Chartered Financial Analyst® (CFA) charter holder requires a bachelor's degree, 4+ year commitment to complete the program, nearly 1000 hours of study to pass 3 levels of examination, a minimum of 4 years of qualified work experience and letters of recommendation to graduate. It is held by over 150,000 professionals around the world who have a strong understanding of advanced investment analysis and real-world portfolio management skills. CFA Institute owns the certification marks CFA® and CHARTERED FINANCIAL ANALYST™.

www.CFAinstitute.org

CIMA® CERTIFIED INVESTMENT
MANAGEMENT ANALYST®

Certified Investment Management Analyst: The CIMA stands out among other financial certifications for its effective emphasis on the combination of investment management theory and practical application. Candidates for the CIMA certification enroll in an executive education program offered by The University of Chicago Booth School of Business, The Wharton School at the University of Pennsylvania, Yale School of Management or the Investment Management Research Program in Australia. Once completed, Candidates must pass the 5-hour Certification Exam, document a minimum of three years' work experience in financial services, pass a second background check, and adhere to the Investments & Wealth Institute's *Code of*



TRUE fiduciary: Our Chief Investment Officer, Chris Cannon, CFA, is an Officer of the Best Practices Board of the non-profit Institute for The Fiduciary Standard. As true Fee-Only Fiduciary Financial Planners and Investment Advisors, FirsTrust believes the standard of care for anyone who calls himself an "advisor" should be higher than currently required by the US Securities and Exchange Commission and the US Department of Labor, and significantly higher than any duty imposed on Brokers to serve the client's best interest. FirsTrust subscribes to the Best Practices Code of Conduct and participates in educational events across the country to help investors know what they should expect from a TRUE fiduciary advisor.

www.TheFiduciaryInstitute.org

1-800-585-9888

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Our Expertise

Wealth Management

Investment Management

Trust and Estate Services

How We Are Different

How We Are Paid

True Objectivity

True Independence

True Expertise

FAQ

Buyer Beware

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