

MFG Planners is expanding its operation in the Pittsburgh area. We are looking to add additional Advisors in our South Hills location as well as help those of you who have your own space. We offer a team and mentorship program to assist you in your financial planning career

MFG Planners has been committed to helping people realize their financial goals for more than 30 years. Now we are looking to help other Advisors do the same thing for themselves

As a Financial Planner with MFG Planners, you will be uniquely positioned within the financial services industry. As an independent fee based planning firm we provide the resources and direction to help you grow your practice.

If you are interested in taking your Financial Advising/Planning practice to the next level or are looking to escape the confines of the wire house world consider partnering with us. Please select the link below to learn more about us and how we can help you grow.



**A Guide to Partnering with
MFG Planners
Producer Group**

Our Philosophy

The Musuneggi Financial Group, LLC was founded to help clients achieve their financial goals and make wise decisions with their money. Today we not only look to help our individual planning clients; but also help other financial service professionals reach their goal.

We strive to help Independent Financial Services Professionals take their practice to the next level. We achieve this through providing them with access to the best products, services, technology, practice management tools and intellectual capital.

Products

As an independent firm we have no proprietary products allowing us the freedom to choose the best for our clients. Our broker dealer provides us with access to most mutual funds, variable & fixed annuities and fee based investment programs in the market. We also have the ability to use direct participation programs; such as Real Estate Investment Trusts, Oil & Gas Limited Partnerships, Unit Investment Trusts & Equipment Financing. Furthermore we can take advantage of alternative investments such as Managed Futures & Managed Options. We are able to charge hourly & annual fees for services & planning programs.

Through our insurance relationships our Advisors have access to fixed life insurance, disability insurance, as well as Long Term Care and Health Insurance. We can also provide access to Life Settlements. Most of these programs can be offered to groups as well as individuals.

Through a relationship with Iron Gate Mortgage, we can provide our advisors with a variety of home mortgage options, including reverse mortgages.

Clearing Relationships

We clear through Pershing.

FAQ

Who is The Musuneggi Financial Group?

- ❖ The group was founded by Mary Grace Musuneggi and her son, Christopher Musuneggi. We have been joined by Rosalind Frazier-Francis as our VP of Operations & Insurance Specialist, Sara Durzo our Director of Marketing, Jane McLean our Business Manager. Today we have additional advisors and staff in the Pittsburgh area and in Oklahoma.

Who is your Broker Dealer?

- ❖ We offer securities and investment advisory services through H. Beck Inc.; an Independent Broker Dealer located in Rockville, Maryland.

Why did we choose H. Beck Inc. (HBI) as our Broker Dealer?

- ❖ When we decided to leave our Insurance company broker dealer, we wanted an independent firm. This would allow us to do what was in the best interest of our clients and provide them with the products and services they needed. We also wanted to work with a broker dealer that had high ethical standards, and provided quality service to its advisors. We looked at many different broker dealers and after almost a year of research decided HBI was the best fit for us.

Do you have a corporate RIA?

- ❖ HBI has a federally Registered Investment Advisor. You can choose to offer investment advisory services through it, or you may use your own RIA.

How is the Firm Element program structured?

- ❖ HBI has an agreement with RegEd to complete your annual firm element.

Can I use my own DBA?

- ❖ You can use your own DBA once it is approved by compliance.

Are there any affiliation fees?

- ❖ No. Other than your E&O insurance there are no fees for being part of the Broker Dealer or the producer group.

What type of Advisors are we looking for?

- ❖ Advisors with at least 5 years of experience preferring an independent broker dealer organization
- ❖ Looking to increase their payout
- ❖ Looking for product and practice management support
- ❖ Considering incorporating fees into their practice
- ❖ Wanting access to alternative investments and assets under management programs
- ❖ Insurance and Financial Advisor as well as licensed CPA's

What Can MFG bring to me?

- ❖ Marketing Department
- ❖ Financial Planning Department
 - Fee based and non fee based plans
- ❖ Training
 - Product
 - How to increase business
- ❖ Growing business
- ❖ Transition to fee based