

# resource consulting group



## Resource Consulting Group: Fostering Clients' Financial Peace of Mind

*Objective Advice. Long-term Perspective.*



The recent economic downturn has had a sobering effect on many investors — heightening the demand for objective financial guidance. Financial gurus and salespeople fuel the hype and “noise” on Wall Street — but rarely do they provide financial peace of mind.

Orlando-based Resource Consulting Group (RCG) is one of the largest fee-only financial planning and investment advisory firms in Florida. Amid a sea of firms that might appear to offer the same or similar services, RCG stands out in two key areas: It does not sell products and it does not receive any form of non-client compensation. This structure eliminates any conflicts of interest with clients.

RCG has achieved success through a systematic, long-term academic-based approach to financial markets. Acting solely in a fiduciary capacity, the firm puts clients' interests first — keeping fee structures low and eliminating hidden costs. In other words: No fine print ... just straight talk and a streamlined, uncomplicated plan to help individuals and families

achieve their financial goals and sustain long-term financial independence.

“Many investors are tempted to focus on the ‘crisis du jour,’ so it’s important that we help them construct and implement a sound financial plan focused on the long term,” said Mike Davis, founder and CEO of RCG.

### The Steady Approach

Founded 25 years ago, RCG offers a talented team of Certified Financial Planner® professionals who focus exclusively on investment management and financial planning solutions. Since its inception, the firm has been fee-only, meaning the only fees accepted by the firm come directly from clients and no other outside sources. Though the fee-only approach was uncommon at the time, it allows RCG to be completely objective regarding a client’s financial situation.

“At RCG, the most relevant investment objective is to maximize the probability that our clients’ future financial goals will be met,” said Kimberly Sterling, president of RCG.

“Our strategy is to improve the odds a little every year to create a high probability of success in the long run. Our team listens to your short-term goals, your immediate needs and your long-term objectives ... and ultimately delivers objective, unbiased advice.”

*Many investors are tempted to focus on the ‘crisis du jour,’ so it’s important that we help them construct and implement a sound financial plan focused on the long term.*

— Mike Davis, founder & CEO of Resource Consulting Group

### About Resource Consulting Group:

- Founded in 1988
- One of the largest fee-only financial planning and investment advisory firms in Florida
- Manages more than \$1 billion in client assets
- 21 employees with nearly 200 years of combined experience, including seven Certified Financial Planners®, one Certified Financial Analyst®, two CPAs and one attorney
- Registered with the U.S. Securities and Exchange Commission as a Registered Investment Advisor

**For more information, visit [www.ResourceConsulting.com](http://www.ResourceConsulting.com) or call (407) 422-0252 to schedule a meeting.**