We are your Financial Advocates

We take the time to understand what you want out of life – for yourself and for your family.

We employ a comprehensive planning approach combined with sophisticated technology designed to optimize your results and help manage your financial goals.

We have years of experience collaborating with clients like you. We believe your financial information should be organized, up to date, easy to understand and accessible to you whenever you want, from wherever you are.

We understand that unexpected events and life changes can impact your dreams. We monitor and track your progress every day and adjust your financial plans along the way.

Pangea
FINANCIAL GROUP

Miami - Houston

www.pangeafg.com

(800) 681-1591

LPL Financial

Securities and financial planning offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC

Pangea
FINANCIAL GROUP

Organize · Analyze · Plan

Employee Benefits & Insurance

Insurance can be an important aspect to a successful long-term strategy. We work with you to create a custom designed plan to help meet your current and future objectives. We aim to accomplish this in the most cost effective manner possible for both the company and its valued employees.

Services/Products

- Employee Benefits Planning
  - Medical, Dental, Vision
  - Disability, Medical GAP
- Business Insurance Planning
  - Buy-Sell, Key-Person
  - Business Continuation
- Life Insurance
  - Group or Individual
- Wellness Programs
- Telemedicine
- Employee Assistance Programs (EAP)
- Disability Insurance
  - Group, Individual
  - Overhead Expense

Financial Planning & Investments

We believe your financial information should be organized, up to date, easy to understand and accessible to you wherever you want, from wherever you are. We take a comprehensive view to develop a deeper understanding of what is required to help manage your goals.

Services/Products

- Wealth Management
- Retirement/Pension Planning
  - 401(k), 403(b), 501(c)(3), SEP/SIMPLE Plans
  - Deferred Compensation
  - Executive Bonus
  - Pension Maximization
- Individual Retirement Accounts/
- IRA (Roth/Traditional)
- College Funding Programs
- Fixed/Variable Annuities
- Stocks, Bonds, Mutual Funds, ETFs
- Alternative Investments

Consulting Strategies

Working in concert with your tax professional(s) we can assist in developing a sound strategy to minimize taxation for both Corporations and Individuals. We act as an extension of your professional team or can provide recommendations to professionals inside our network.

Services/Products

- Benefits and HR Management System
- Human Resources Support
  - Online HR Library
  - Auto HR Call Line
  - Compliance Document Support (ERISA/PPACA)
- Payroll Analysis and Planning
- Estate Analysis and Planning
- Income Analysis and Planning
- Executive Compensation Planning
- Employee Retention Strategies
- Risk and Cost Reduction Consulting
- Employee Benefits Consulting