

Client Quick Reference Guide

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FG Client Services Quickstart Guide

Financial Gravity (FG) Companies Inc., along with its subsidiary companies, provides investment and tax professionals with a turnkey family office charter. To learn more about each division of our company, here is a list of our websites for your reference:

<https://financialgravityassetmanagement.com/>

<https://financialgravityenhancedmarkets.com/>

<https://financialgravityfamilyofficeservices.com/> (Add your family office directors last name at the end of this URL link)

Who to Contact

Your Client Success Team can be reached at (800) 588-3893 - Press 2. Make sure to add this number to your save phone numbers! You can also email our team at clientsuccess@financialgravity.com.

- [Meet the Client Success Team](#)

Financial Gravity Brochures

- [4 Beta Dependable Return Investment Strategy](#)
- [4 Beta Taxable Fixed Income Investment Strategy](#)
- [4 Beta Equity Investment Strategy](#)
- [4 Alpha Investment Strategy](#)
- [4 Alpha Stocks](#)
- [Market Timing Looks Easy](#)
- [Dividend Facts](#)
- [FG - Control the Controllables](#)
- [HALO - Holistic Asset Location Optimization](#)
- [Time Optimized Planning \(TOP\) Brochure](#)
- [Mutual Fund Facts](#)
- [Dr. William Nelson Bio - Chief Investment Officer](#)
- [FGAM Market Webinar \(April -2024\)](#)
- [FGAM Market Update \(October - 2024\)](#)

Helpful Articles

- [Client Portal Overview](#)
- [Charles Schwab Overview](#)
- [Fidelity Overview](#)
- [Financial Planning Overview](#)
- [Pontera Overview](#)

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