



PERSONALIZED PLANNING FOR A SECURE FUTURE

CRR, LLP has partnered with Axial Financial Group—an independent financial services firm that provides wealth management services.

BENEFITS OF A COORDINATED APPROACH:

- The combination of your CPA firm and wealth management firm working together provides you with a coordinated financial plan, as well as seamless and unified communication.
- Complimentary, no-cost obligation review of your financial situation, including a full wealth management plan presentation, asset allocation review, and proposed repositioning.
- Oversight and coordination of the accumulation, protection, and distribution of your financial assets.
- Direct access to Axial’s team of financial advisors, retirement plan experts, and insurance/employee benefits specialists.
- A dedicated “Quarterback” from Axial who will ensure that all members of your financial team (client, accountant, attorneys, asset manager, insurance professional, lending specialists, bankers) are working together toward a common goal.



David J. Richards
Managing Partner, CRR, LLP

“Having Kristen working within our office translates to real-time communication regarding our client’s tax and accounting needs as well as their financial planning objectives. This alliance results in a tremendous value for our clients”



Kristen Smith*
CFP®, AIF®, Axial Financial Group LLC

“Navigating today’s financial landscape has become increasingly complex and challenging. This integrated approach ensures that the members of your financial team are working efficiently towards a common goal: your financial success”

For more information, contact Kristen Smith at 781.273.1400 or ksmith@axialfg.com.

*Securities and advisory services offered through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser. CRR, LLP (also represented as CRR, CRR CPA), Axial Financial Group, and Commonwealth Financial Network are separate and unrelated entities. Axial Financial Group is located at 5 Burlington Woods, Suite 102, Burlington, MA 01803. PH (781)- 273-1400.