Advanced Wealth Planning Group

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Applying more than 44 years of financial planning, insurance and wealth management experience, the Atkinson Alvarez Team provides comprehensive solutions to a diversified client base. Whether that client is an individual, a small business, a non/not-for-profit organization or an institutional client, the team offers a strategic approach to financial management and comprehensive investment services.

Client commitment

The Advanced Wealth Planning Group is committed to providing its clients with the highest level of service while maintaining access to industry leading wealth management solutions and a diversified compliment of resources. Team services include:

- Financial planning services
- Retirement plans
- Tax planning
- Life, health, disability and long-term care insurance
- Insurance
- Estate planning strategies
- College and education planning services
- Business alliance programs
- Florida Retirement System FRS/DROP planning
- Non/not-for-profit organization and endowment wealth management services

Wealth management approach

The financial needs and unique characteristics of clients vary significantly. The Advanced Wealth Planning Group offers the flexibility and vast resources to design and implement financial solutions that are structured to meet those specific goals and objectives.

ADVANCED WEALTH PLANNING GROUP

Business alliance program

The Advanced Wealth Planning Group provides comprehensive investment services to institutional clients to enable them to meet the ever-evolving financial needs of of their customers. The team delivers customized solutions targeted to address the unique objectives of its clients while improving productivity, profitability and providing added customer value.

The team can offer a full-range of products and services designed to compliment traditional client products, without product or vendor bias, such as:

- Mutual funds/separately managed accounts
- Annuities
- IRAs
- Equities
- Fixed income
- Insurance
- Retirement plans

Non/not-for-profit organizations and endowments

The Advanced Wealth Planning Group can address the challenges that non/not-for-profit organizations and endowments face in managing an investment portfolio and spending requirements. As your advisors, the team can:

- Develop investment strategies to meet specific investments and spending needs
- Offer guidance and direction regarding best investing practices and effectiveness
- Provide advisory services to investment committees

Whether a foundation, a private trust, an educational institution, or social services organization, the Atkinson Alvarez Team can assist you in effectively and efficiently achieving your mission.

A strategy. A solution.

The financial world continuously ebbs and flows in an everchanging global environment, leaving investors with difficulty determining the best path. Institutions struggle with the same concerns but also strive to develop the best competitive strategy.

The Advanced Wealth Planning Group, using a depth of experience and a diverse menu of products and services, can provide clients with solutions to charting their financial objectives and achieve their desired outcomes.

Armand A. Atkinson, MS, CFP®, ChFC®, CLU®, CIMA®, AIF®, ChFEBC℠

President | Financial Advisor

Armand holds a Bachelor of Arts degree in economics from Eckerd College and a Master of Science degree in personal financial planning. As a committed life-long learner, he has completed multiple post-graduate courses and earned the CERTIFIED FINANCIAL PLANNER™ designation from the Certified Financial Planner Board of Standards, Inc. He has earned the prestigious Certified Investment Management Analyst designation from the Investment Management Consultants Association. He also holds the following designations from the College for Financial Planning: Master Planner Advanced Studies, Accredited Wealth Management Advisor, Chartered Retirement Planning Counselor, and Chartered Mutual Fund Counselor. He is also a graduate of the Dave Ramsey Financial Peace University.

Armand has earned his Chartered Federal Employee Benefits Consultation designation, giving him a thorough understanding of the CSRS & FERS benefit programs applicable to federal employees. Armand passed the FINRA Series 7 and Series 66 exams and holds a Florida life, health and variable annuities license. He serves as an approved 403(b)/457 representative for Pinellas County Schools, Manatee County Schools, St. Petersburg College and the State College of Florida.

Robert G. Alvarez, CFP®

Financial Advisor | Insurance Director

Robert is a third generation Floridian and during his 26 years of working in the financial services industry, he has had the privilege of serving many families in the Tampa Bay Community. He is a graduate of the University of South Florida with a degree in finance and has also earned the CERTIFIED FINANCIAL PLANNER™ designation from the Certified Financial Planner Board of Standards, Inc. Robert passed the FINRA Series 7 and Series 24 exams and holds a Florida life, health and variable annuities license.