



Brett Ellen, CFP®

## NEWS

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# American Financial Network Hires Impact Communications to Promote Business Services

## *Top Financial Advisor Brett S. Ellen Expands Collaborative Services Platform*

CALABASAS, CA (August 18, 2009) – Brett Ellen, President of American Financial Network (AFN) announced today that he has engaged Impact Communications to help promote the Collaborative Services Platform, the firm’s planning solution for business owners and executives. “While most privately-held companies have benefits programs in place, few owners have adequately addressed the complex tax, compensation and risk management issues that offer opportunities to maximize income and minimize corporate and individual tax liabilities,” said Ellen. “AFN has extensive expertise in these areas and we want to get the word out both to individuals and organizations that can benefit from our services and to other advisors who want to serve this important segment of the market.”

AFN also works with executives in large public corporations to help them maximize their compensation benefits. For quite some time there has been a decided shift away from defined benefit plans, where company sponsors determine investment decisions, to the defined contribution plans, where participants are obliged to make their own investment decisions. As corporations have sought to limit financial liabilities, plan participants have had to become extremely active in their own retirement planning and shoulder the burden.

In a defined contribution plan, participants have full responsibility for portfolio strategy, fund selection, asset allocation, performance tracking and tax implications. Realistically, however, few top executives have the time, background or inclination to actively manage their retirement programs. And, if they do, most will look at their investments separately, as stand alone investments. Financial elements such as deferred compensation plans, defined benefit plans, 401(k)s, annuities, IRAs, supplemental executive retirement plans (SERPs), personal investments or real estate, are complex and should be viewed as an integrated whole in order to understand their full potential and fund maximum retirement dollars.

In nonqualified defined contribution retirement plans, including SERPs, there is a great deal of flexibility and freedom for asset allocation. But this freedom carries with it the financial burden to structure plans more carefully than ever before. And that requires the combined expertise of a solid benefits planning consultant and a seasoned financial planner capable of designing plans that meet individual retirement goals and, often, very different objectives. Ellen and his team of affiliates - the Financial Solutions Alliance - work extensively with corporate executives to develop the most effective strategy for maximizing both current and deferred compensation benefits.

In addition to working directly with clients on these types of issues, Ellen has developed the Collaborative Services Platform to serve as a training center for advisors, regardless of their RIA or broker/dealer affiliation, to learn the intricacies of the deferred compensation / retirement landscape. The 2-day, highly interactive training program (for which CE credits are available) is followed by monthly continuing education calls. “The advisors we work with are already successful planners,” says Ellen. “What they are looking to do is develop their expertise in this business-oriented field as a way to better serve their current clients and expand their practice to serve the business market. During our training sessions, we lose count of the “aha” moments, as participants grasp the technical details and recognize the additional value they can bring to clients.”

CSP trainings are held several times per year. The next training will be September 14 - 16, in Santa Monica, CA.

For more information about planning services or the Collaborative Services Platform training, contact Denise Villanueva at [dvillanueva@afn-net.com](mailto:dvillanueva@afn-net.com) or (818) 264-4989.

### **About Brett Ellen and American Financial Network**

Brett Ellen, founder and president of American Financial Network, is a financial planner and investment advisor representative with Securities America Advisors who specializes in wealth management and corporate benefit planning services. Additionally, Ellen established and is an active part of the Financial Solutions Alliance, a network of financial service providers from across the country that work collaboratively to address the financial and business needs of their clients. Unprecedented in his ability to serve both individual investors and corporate planners, Ellen is recognized by Securities America as their top advisor.

As a California native, Ellen believes strongly in giving back to his community. He and his firm actively support a variety of non-profit organizations. In 2008, the Muscular Dystrophy Association awarded Ellen the prestigious Humanitarian of the Year Award for his philanthropic endeavors and dedication towards making a difference. In 2001 he and his wife, inspired by their children, formed their own non-profit. TKOHelpingHands.org (Turn Kindness On) promotes community involvement and social responsibilities in young children. Ellen also posts the Kids' Finance Coach ([www.coachbrett.blogspot.com](http://www.coachbrett.blogspot.com)), a blog for children to help them understand money and finance. For more information about Brett Ellen and the Collaborative Services Platform, visit [www.afn-net.com](http://www.afn-net.com).

### **About Impact Communications, Inc.**

Founded by industry veteran Marie Swift in 1993, Impact Communications specializes in developing effective client communications and marketing strategies for a select group of highly successful financial advisors and allied institutions. Widely respected as a marketing professional with a loyal following, Swift, along with her team, works with independent advisors and select institutions to increase both visibility and credibility within their niche markets. In addition to marketing strategy and media promotions, the firm offers clients graphic design services and executive coaching. For more information visit [www.impactcommunications.org](http://www.impactcommunications.org).

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### **NOTE:**

When you need a knowledgeable professional to speak on complicated financial topics in an easy-to-understand manner, please call Brett Ellen.

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