



FINANCIAL PLANNER

Meet Lisa Cassidy:
Founder AFSG Wealth Management, LLC

Lisa Cassidy strives to educate and support her clients as they develop an understanding of strategies designed to preserve retirement assets while creating income in both rising and falling markets. Formerly, holding positions such as Director of Regulatory Affairs and Director of IT, Lisa brings a diverse skill set and experience to the financial services industry.

With a passion for listening, she quickly attunes to her client's needs taking a holistic approach to providing them with meaningful solutions and strategies.


As a fiduciary Investment Advisor Representative, she founded AFSG Wealth Management and works alongside Al Martinez founder of America's Financial Solutions Group* and host of Retirement and Income radio to better serve the Colorado and Wyoming areas by providing comprehensive financial planning services.

She holds her Series 65 securities license, as well as both Life and Health Insurance licenses.

When Lisa is not meeting with clients, you can find her spending time with her family or volunteering for Hospice. She also enjoys an active Colorado lifestyle as an outdoorswoman hiking and climbing mountains. She is the proud mother of a son and a daughter and has one granddaughter.



 lisa@americasfsg.com

 303-478-3358 ext 808

Areas of Expertise:

Financial Planning:

- Income Planning
- Advanced Tax Planning
- Legacy Planning
- Long Term Care Planning
- Asset Protection
- Wealth Management
- 401K, TSP, 403(b) Rollovers
- IRA and ROTHs
- Annuities
- Life Insurance
- Small Business 401(K) Plans

* Lisa Cassidy is an investment adviser representative of Aegis Wealth Management, Inc. The firm is registered as an investment advisor with the SEC and only conducts business in states where it is properly registered or is excluded from registration requirements. Registration is not an endorsement of the firm by securities regulators and does not mean the advisor has achieved a specific level of skill or ability. America's Financial Solutions Group and AFSG Wealth Management are not affiliated and no other employee or associate of America's Financial Solutions Group is registered as an investment adviser representative of Aegis Wealth Management Inc. or any other investment adviser. Content should not be viewed as legal or tax advice. You should always consult an attorney or tax professional regarding your specific legal or tax situation. Estate planning is done in conjunction with your estate planning attorney, tax attorney, and/or CPA. Aegis Wealth Management Inc. is not engaged in the practice of law or accounting. Aegis Wealth Management Inc., America's Financial Solutions Group and AFSG Wealth Management are all unaffiliated entities.