



## 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.



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### 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