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Neto Financial Group is a boutique wealth management firm specializing in alternative strategies and dynamic asset allocation for individuals and small business retirement plans.

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504-831-4636 || www.regattaresearch.com

Managed by Eric Greschner and Rudy Blanchard, Regatta Research offers fee-only financial planning, research, continuing education and portfolio management services throughout the U.S. Offices located in TX, CA, and LA.

Clientfirst Wealth Management, LLC

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Greenwood Capital focuses on serving its clients through a holistic approach to managing their wealth and developing investment strategies that target long-term goals and objectives.

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AdvisorAlliance is an SEC-registered investment adviser providing investment management to retirement plans and individuals utilizing proprietary asset allocation models and investment methodology.

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Bob Fugate, CFP®, and his team specialize in creating and preserving wealth in a conscientious manner to make your association with us both a satisfying and profitable experience.

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