

# Welcome to Mark Aho Financial Group



“We like to start the relationship off by understanding your values, so that we can guide you toward your goals over time, with thorough reviews.”

## An Introduction to Our Office and Our Commitments to You

Thank you for choosing the professionals at the Mark Aho Financial Group for your financial planning and investment needs. We appreciate the trust and confidence you have placed in our office, and we look forward to assisting you in the pursuit of your long-term goals.

Our guided planning process will be the centerpiece of your retirement plan, and our relationship will be based on a mutual understanding of your values. We will guide you toward your goals with reviews, and we will always convey our risk management approach to you clearly, both in terms of principal loss and purchasing power loss.

In addition, we will consistently follow our six core principles:

### Investor principles

- › You must have faith in the future
- › You must invest with patience
- › You must maintain discipline

### Investment Principles

- › Asset Allocation
- › Diversification
- › Annual Rebalancing

We treat all people equally and with great respect. Our services are delivered in an honest, truthful way every day. Our values are based on truthfulness, integrity and kindness.

*\*Diversification and asset allocation do not ensure a profit or protect against a loss.*

**Mark Aho Financial Group**  
205 N. Lakeshore Blvd, Suite B  
Marquette, Michigan 49855  
[www.markahofinancial.com](http://www.markahofinancial.com)

**Mark A. Aho**, MBA, CFP®, CIMA®  
President, MAFG  
Financial Advisor, RJFS  
[mark.aho@raymondjames.com](mailto:mark.aho@raymondjames.com)

Tel. 906-226-0880  
Fax. 906-226-1767

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