CLIENT FIRST

Through our partnership with you, our team delivers coordinated financial planning, holistic investment management and retirement income strategies. We are dedicated to you every step of the way, providing financial clarity and solutions designed around your priorities and goals.

ADVANCED FINANCIAL

STRATEGIES

ADVANCED FINANCIAL
STRATEGIES

We are your single point of contact for all of your financial matters.

We seamlessly coordinate the many components of your wealth management plan. We help you build, maintain, and evolve your financial plan, which integrates a coordinated set of financial planning considerations. One of our greatest strengths is the collaborative team of specialists that we have assembled to serve and support each client.

Wealth Adviser	Registered Investment Adviser	Team of Experts	Independent Custodian
ADVANCED FINANCIAL STRATEGIES	ROYAL FUND MANAGEMENT, LLC Client First		charles SCHWAB / TD Ameritrade

Investment Managers			
Nationwide	ZEGA FINANCIAL	CANTOR Fitzgerald	Vanguard®

- Our coordinated network results in a unified solution that enables you to focus on what is most important to you.
- By overseeing your entire financial plan, we develop a deep understanding and awareness of your entire financial picture to provide you with clarity.
- Our partner organizations combine the credibility of globally-recognized financial firms with local, independent partners working together for you.
- Each of our partners has clearly defined roles and responsibilities. The synergy creates robust financial planning capabilities.

A STRONG NETWORK

Registered Investment Adviser

Royal Fund Management, LLC is a SEC Registered Investment Adviser. As fiduciaries, we are obligated to act in the best interest of our clients. As an independent advisory firm, there are not product relationships that may cloud our judgement when choosing appropriate investments. The firm's compensation is directly correlated to the value of our clients' managed account, which aligns our interest. *Client First* is not just a logo. Our mission statement is quality, service, teamwork and the quest for excellence.

Our Coordinated Team

Our established network of professionals provides extensive expertise and seamless coordination across all aspects of your financial life. This includes tax planning, estate planning, Social Security and Medicare strategies, account aggregation, and more.

Independent Custodian

We partner with independent financial institutions to provide asset custody and safekeeping services, which creates a critical barrier between your funds and any outside party. The custodian provides you with periodic statements, executes trades, and collects all interest and dividend income owed to you.

As heard on

95.5 The Coyote

96.5 KECO

99.3 KCLI

As seen in

Kiplinger's RETIREMENT PLANNING 2020

MEET OUR TEAM MEMBERS

BRYAN BACA

FOUNDER & PRESIDENT OF ADVANCED FINANCIAL STRATEGIES

Bryan Baca has almost three decades of comprehensive wealth management experience. He believes financial planning today is a continuously evolving process, and the good news is you may feel more confident to handle all the uncertainties if you have an updated plan that addresses today's volatile economic conditions.

His passion is to help clients discover the latest financial strategies to possibly maximize and protect their retirement nest egg. Bryan believes his clients should have every opportunity to understand the risks, rewards, and implications of investment choices and that their lifestyle and needs change. His experience enables him to offer diverse planning advice while putting to work his extensive knowledge of the industry. Bryan has served on many professional boards. As a fiduciary, there is no product bias when determining appropriate investments.

He and his wife of over 30 years have been blessed with two adult children and one grandchild. Bryan enjoys traveling, hunting and fishing, spending time with family and friends, and cooking over the campfire.

BRILEY BACA

VICE PRESIDENT OF ADVANCED FINANCIAL STRATEGIES

As the vice president of Advanced Financial Strategies, Briley helps provide clients with a 360-degree view of the current economic climate. Briley holds a Series 65 (Uniform Investment Adviser Law) and is an Investment Advisor Representative with Royal Fund Management LLC. By being a fiduciary, he is able to choose from a variety of investment portfolios, managers and products that may help his clients achieve their financial goals and shape their legacy for generations to come.

He is devoted to helping retirees and those about to retire, with the goals of protecting their money and ensuring it lasts as long as they do. Briley focuses on safe money strategies and helps individuals mitigate risk and enjoys educating his clients to help them avoid common financial pitfalls.

When Briley is not working, he enjoys hunting, fishing, and spending time with his wife and family. Someday Briley would like to spend some time in the Rocky Mountains bow hunting for a trophy bull elk.

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ROYAL FUND MANAGEMENT TEAM

Mark Sorensen

CEO, Founder

mark@royalfundmanagement.com

Linda Sorensen

Co-Founder/Office Management

linda@royalfundmanagement.com

Craig Merz

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Carissa Bruce

Chief Administrative Officer / Executive Assistant

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Chief Compliance Officer

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Jay Pestrichelli

CEO and Co-Founder of ZEGA Financial

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ADVANCED FINANCIAL
STRATEGIES

OUR APPROACH TO COORDINATED PLANNING

- Social Security Strategies
- Estate Planning
- Tax Planning
- Medicare Planning
- Life Insurance
- Lifetime Income Planning
- Investment Management
- Retirement Planning

ADVANCED FINANCIAL
STRATEGIES

CORE VALUES

Fiduciary

We serve as a fiduciary at all times and for all aspects of our relationship. Although our recommendations need to be suitable for your situation, we are held to a higher standard and must always act in your best interests.

Transparency

Our fees and responsibilities are put in writing. We are fee-based advisors and do not receive commissions. This aligns our interests as we only do better when you do. It puts us “on the same side of the table”.

Commitment

As fiduciaries, we are held to a higher standard of care and commitment. We diligently serve as your comprehensive financial advisor with clearly-defined and easy to understand mutual responsibilities.

Communication

Frequent communication is key. We communicate regularly through our newsletters, email and video emails, as well as phone calls. Planning and account reviews are scheduled annually, at a minimum. Communication frequency is increased as the need arises. We always make ourselves available anytime we are needed.

Independence

We are not owned, controlled or directed by any other entity. This allows us to seek and implement what we believe are the best possible solutions for our clients.

Proactivity

We help you prepare for the unforeseen circumstances we all face over time. We make sure your financial plan is dynamic as it may have to evolve based on unanticipated events.

Organization

We will help bring order and simplification to your financial life.

Relationship

We work collectively with you, not just for you.

Accountability

Accountability refers to our obligation and willingness to accept responsibility. Through clear and concise planning, we stay on course and work together to achieve your goals.

Education

Education is a cornerstone in our financial planning process. We believe our clients should understand what we are doing, why we are doing it, and how it benefits them. Through education, our clients can make clear financial decisions.

ADVANCED FINANCIAL
STRATEGIES

OUR FAMILY LOOKS FORWARD TO HELPING YOUR FAMILY

Briley & Kaci Baca

Bryan & Leadell Baca

110 South 13th St. Clinton, OK 73601
580-323-6800

www.retirewithbaca.com

Investment Adviser Representative of and investment advisory services offered through Royal Fund Management, LLC a SEC Registered Investment Adviser.

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