

BENEFITTING

you

Sweeney &
Associates

Kristi Sweeney, CFP®

The Company

Sweeney & Associates, LLC has benefited individuals and their businesses since 1991. We provide reliable financial tools and the expert guidance needed for our clients' secure financial future. We strive to make complicated information understandable and complex decisions easier.

A full range of insurance products and services are provided for firms seeking to enhance their employee benefit plans. A full family office, we offer insurance and financial solutions to people in between jobs as well as to retirees. Unique to most practices, we also offer guidance to families with special needs. Fee based consultation is always available to meet client requests.

In Business To Benefit You and Your Business

We firmly believe that there is *nothing* like insurance to help businesses, individuals and families in times of crisis. Our business serves our clients with the belief that each person or company that we work with, no matter what size, is the most important client that we have. Because of this we keep and grow with our clients year after year.

Representative Clients

60% of our business consists of group benefits. We currently work with over 135 businesses. 40% of our business serves individuals and families with special needs. We work with several non-profits as well as providing benefits for diverse wholesale, retail and service businesses. References are provided upon request.

Memberships

- ❖ Metro Denver Association of Health Underwriters
- ❖ Estate Planning Council of Southeast Denver
- ❖ Financial Planning Association

©2006 Sweeney & Associates

6143 South Willow Drive Suite 101 Englewood, CO 80111-5122 303 773 0200 303 773 0247 Fax