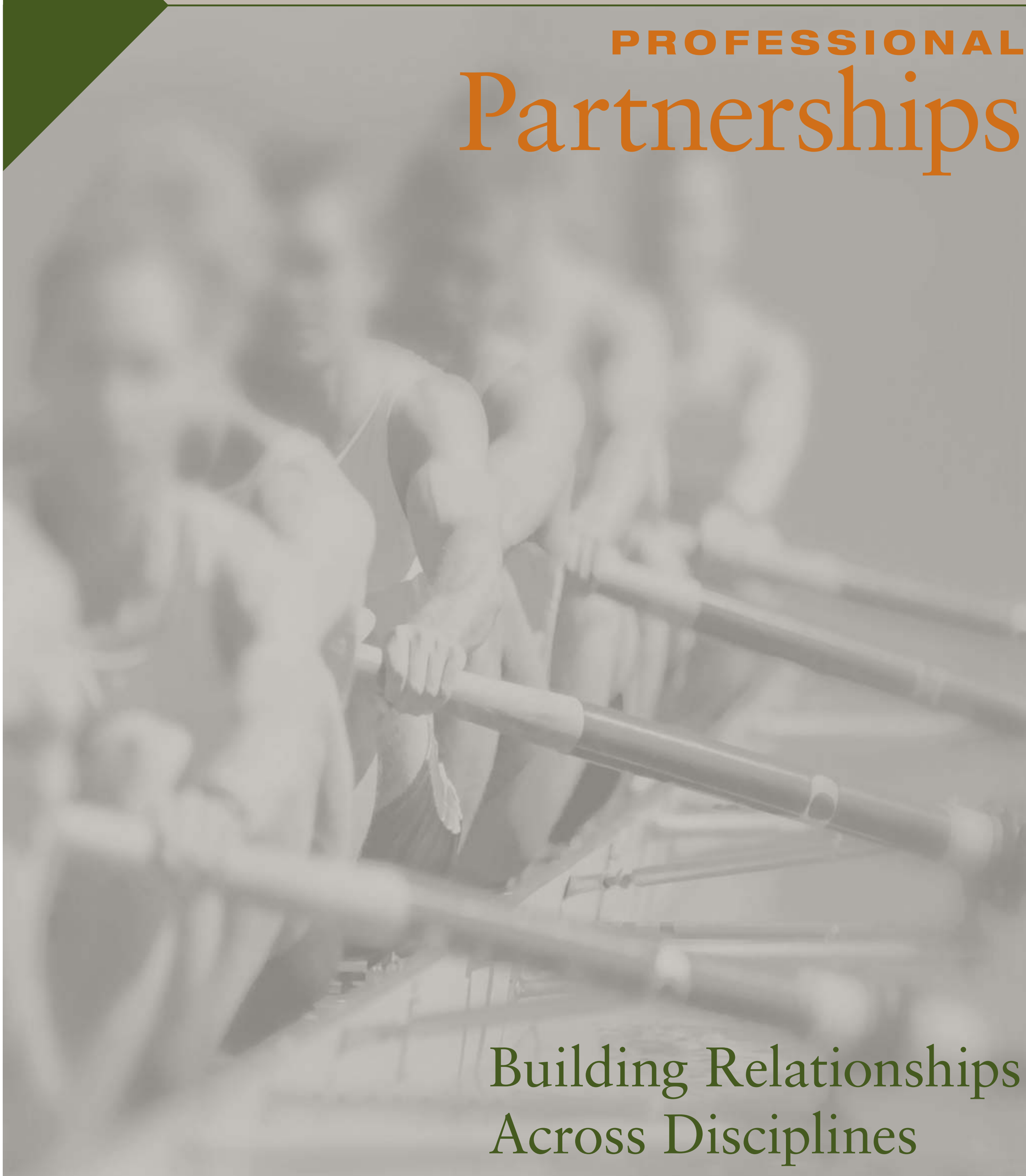
NATIONAL FINANCIAL PARTNERS

PROFESSIONAL Partnerships

For CPAs



Building Relationships Across Disciplines

The Power of Partnerships

As a trusted advisor, your clients often look to you for recommendations and referrals beyond the scope of your specific area of expertise. NFP Professional Partnerships helps you to leverage the relationships that you have built, by expanding the range of financial services and solutions that you offer to clients, while maintaining your independence and objectivity. National Financial Partners Corporation's Advisors are committed to forming strategic alliances that provide CPAs with access to a high level of expertise in the implementation of insurance, investment and corporate benefit recommendations.

Leveraging Expertise and Access

NFP (NYSE:NFP) consists of a powerful network of more than 300 owned and member firms that are committed to the highest standards of professionalism. We serve clients with creative, comprehensive solutions that are designed to match their specific needs.

Our Professional Partners are distinctly positioned to form key alliances that help broaden your sphere of influence among your individual and corporate clients.

A Broadened Scope of Service and Support

Your Advisor serves as your local partner and has a vested interest and professional commitment to support your client relationships with a full range of non-proprietary financial solutions from many of the leading providers in the nation.

NFP has significant relationships with more than 20 leading insurance companies for variable and traditional insurance products. In addition, we have access to a wide range of other carriers to suit clients' specific needs. NFP Advisors also have access to a broad selection of non-proprietary investment products and services from some of the country's leading money managers and financial institutions.

NFP further supports Advisors and their alliances with comprehensive technology, marketing and compliance services.

Your Advisor will guide you through the insurance and licensing processes and ongoing continuing education to meet state and FINRA requirements. A representative of your CPA firm must obtain the appropriate insurance and FINRA securities licenses, as well as errors and omissions insurance.

Serving as a facilitator and counselor for your client's insurance and investment funding needs, you will receive duplicate statements and trade confirmations for all of your clients' account activities.

A Comprehensive Range of Resources and Capabilities

Estate Planning

- Tax efficient wealth transfer
- Estate liquidity needs
- Estate tax reduction strategies

Business Planning

- Corporate benefits
- Business succession planning
- Non-qualified deferred compensation
- Key person insurance
- Group retirement plans

Risk Planning

- Life insurance programs
- Income protection planning
- Long-term care insurance
- Disability insurance

A Strategic Alliance Structured to Strengthen Your Client Relationships

NFP Advisors strive to maintain the highest ethical standards. At every point in the process and throughout the relationship, you can count on your NFP Advisor to:

- Work to demonstrate value-added service to your clients
- Help maintain appropriate records of suitability
- Provide customized design and a high level of client service

In keeping with this philosophy, every NFP Advisor is obligated by contract, as well as a professional commitment, to uphold stringent NFP professional standards for working with CPA firms. This includes a sharp focus on:

- Clear client disclosures
- Objectivity, due to no quotas or proprietary products
- Competency and a high-level of expertise
- Confidentiality of all your client files

NATIONAL FINANCIAL PARTNERS

CRESCENT
WEALTH MANAGEMENT

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For use with CPAs only.

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