

Everything you  
need in one place.

# Client Resource Guide



A Cornerstone Planning Group Advisor

“Money isn’t the most important thing in life – but it gives us options.”

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# Our Team



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Financial Advisor | CLTC, LACP, RICP®, LUTCF

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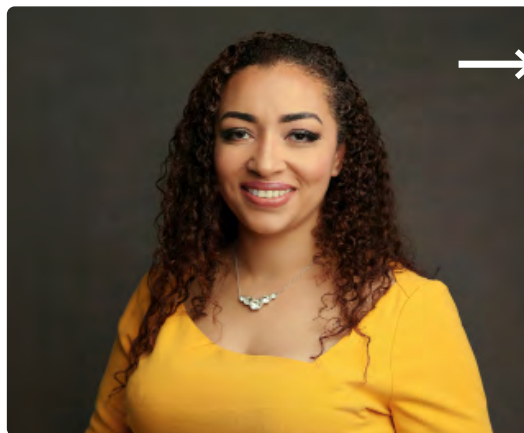


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**Katherine Angulo**

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Executive Assistant

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# Investment Partners



In an effort to better serve you, we've partnered with Cornerstone Planning Group, an Independent Registered Agent, to facilitate the operational side of our firm.

- 301 Passaic Avenue, Suite 201  
Fairfield, NJ 07004
- [cornerstoneplanninggroup.com](http://cornerstoneplanninggroup.com)

This includes:

- Compliance
- Technology and Platform Access
- Portfolio Management

## Meet the Service Team



**Jessica Kote**  
*Manager | Advisor Support*



**Anthony N DePersio**  
*Advisor Support Specialist*



**Wendy Marin**  
*Advisor Support Specialist*



**Tyler Allen**  
*Advisor Support Specialist*



**Ethan Kupfer**  
*Advisor Support Specialist*

**1-973-487-3220 | [serviceteam@cornerstoneplanninggroup.com](mailto:serviceteam@cornerstoneplanninggroup.com)**

# Planning Partners

To expand the range and quality of solutions we can offer, we work with a select network of product providers who give us access to specialized insurance and benefit strategies tailored to your needs.



**PartnersFinancial** is a national network of independent advisory firms that provides advanced planning expertise, strategic resources, and collaborative support to help advisors deliver sophisticated financial solutions for individuals, families, and business owners.

→ Learn more at [www.partnersfinancial.com](http://www.partnersfinancial.com)



**LTCI Partners** is a national brokerage firm specializing in long-term care (LTC) insurance solutions, acting as an intermediary to make planning easy. They provide end-to-end support, including employer-sponsored group plans, individual, and hybrid life/LTC insurance.

→ Learn more at [www.ltcipartners.com](http://www.ltcipartners.com)



**Empire State Benefits (ESB)** is an insurance brokerage specializing in individual disability, life insurance, long-term care, and annuities. They work with various carriers to find the best value for clients, specifically focusing on tailored coverage options.

→ Learn more at [www.empirestatebenefits.com](http://www.empirestatebenefits.com)



**Ash Brokerage** is a brokerage general agency (BGA) that provides services insurance products, including life insurance, long-term care, disability income, and annuities. They assist in finding, designing, and underwriting customized insurance solutions for clients to protect assets and ensure financial security.

→ Learn more at [www.ashbrokerage.com](http://www.ashbrokerage.com)

# Client Access



**E-Money** is our Wealth Management Portal and will serve as your primary point of access. With its integration feature, clients can link external accounts, giving you the ability to view and analyze your accounts from one website. Our resource guide includes all the information you need for setting up access and adding external accounts. The Vault feature also allows clients to securely upload statements and other documents needed for financial planning.

→ [Access Your Financial Plan](#)



**AdvicePay** is our client billing system used (typically once per year) to distribute financial and business planning invoices. This system allows for clients to choose from multiple payment methods and experience greater flexibility in payment frequency.

An initial registration email from our compliance partner, Cornerstone Planning Group, will prompt clients to sign our Client Advisor Agreement.

→ [Make A Payment](#)



**Charles Schwab** is the platform used for your investment accounts where activity such as contributions, withdrawals, and trades takes place. While we guide and manage your investment strategy, Schwab is the system that holds your assets and processes these transactions.

→ [Access Your Investment Accounts](#)



**Black Diamond** is for our clients who want a deeper dive into their accounts. It gives access to client investment accounts, as well as performance, allocations, activity and summary. It also includes a secure messaging vault for sending confidential information both ways.

For access, please contact us for account credentials. For tech challenges or questions email: [client@cornerstoneplanninggroup.com](mailto:client@cornerstoneplanninggroup.com).