

## Tax & Financial Group celebrates Semi-Centennial Anniversary

On October 16th 2020, Tax & Financial Group (TFG), held a physically distanced ceremony to honor the firm's 50th anniversary.

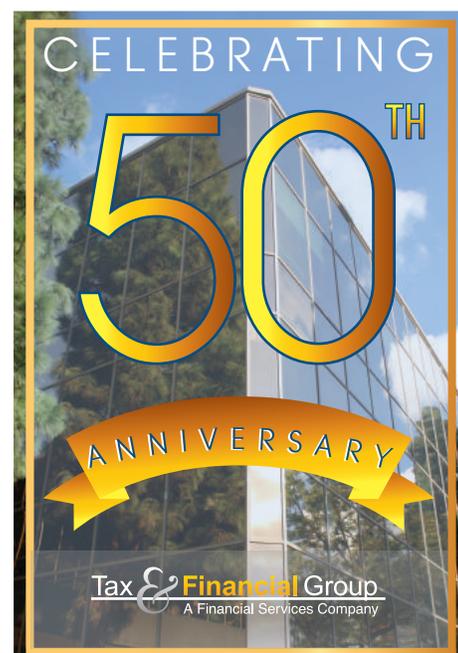
Andy O'Brien, Managing Director of Financial Services unveiled a time capsule to be filled with significant company related mementos preserving the memories and legacy that the firm has built over its 50 years. The time capsule will be opened on the firm's Centennial anniversary in 2070. The ceremony included a congratulatory video in which Gloria Crockett, CEO of Make A Wish Orange County and Inland Empire Chapter, recognized TFG as a pillar of the community for raising over 1.9 Million to date for the nonprofit.

The ceremony also included a Years of Service Acknowledgement presentation honoring company associates, some of whom have been with the organization since its beginnings. Founder and Chairman, Dick McCloskey was celebrated for his 50 years of leadership not only within the company but also in the financial services industry. When asked how the firm got to 50 years, TFG's President, Sean McCloskey, attributed it to a culture of doing the right thing and a commitment to excellence.

The firm was originally founded in 1970. Over the years the firm has collected an impressive array of awards and honors. TFG received the GAMA International (an association of field managers in the financial services industry) Master Agency Award for 25 consecutive years, starting in 1986. Founder Dick McCloskey served as the 1998-99 President of GAMA International, and has served on the Board of the LIFE Foundation and Make-A-Wish Foundation of Orange County and the Inland Empire.

Today, TFG has grown to multiple locations throughout the United States encompassing talented financial advisors dedicated to assisting a successful clientele with the creation, management and preservation of wealth. Company associates are in over 50 associations throughout the community and the firm has been named in the top 20 of the Orange County Business Journal's 2020 List of Financial Advisors/Brokers\*. This is the 4th consecutive year TFG has been named to the list.

TFG offers a wide range of financial products and services including business succession and financial planning, retirement income accumulation and distribution strategies, investment portfolio management, estate and philanthropic planning, college funding solutions, and risk management strategies. As an independent firm, TFG is not proprietary to any products. To learn more about Tax & Financial Group, visit [tfgroup.com](http://tfgroup.com)



\*As of May 2020, Based on 46 registered representatives and investment advisor representatives and 45 employees. Awards and club membership are based primarily on commissions, premiums, or fees generated from investment and insurance products and other criteria relative to leadership, achievement, and recruiting. Working with this individual or firm is not a guarantee of future financial results. Investors should conduct their own evaluation. Securities and Investment Advisory Services offered through Securian Financial Services, Inc. Member FINRA/SIPC. TFG is independently owned and operated. 4001 MacArthur Blvd., 3rd Floor, Newport Beach, CA 92660 – (949) 223-8100. 3292907 DOFU 10.2020