



## Building and Managing Wealth.

Start to achieve your financial dreams today with



■ McCONNELL & Co., INC. PRIVATE CLIENTS GROUP\* ■ McCONNELL, ROTHMAN & Co., P.C. CERTIFIED PUBLIC ACCOUNTANTS ■ HERITAGE MORTGAGE COMPANY, INC.

To learn more about The McConnell Group,  
or to arrange a complimentary initial consultation, please contact us today:

175 Derby Street, Suite 36, Hingham, MA 02043  
Tel: 781-740-5000

Or visit our Web site at  
[www.mgroup3.com](http://www.mgroup3.com)

\*Securities offered through 1st Global Capital Corp., Member FINRA, SIPC.  
Investment advisory services offered through 1st Global Advisors, Inc.

Massachusetts Mortgage Broker # MB1203

The McConnell Group of Companies and 1st Global Capital Corp. are unaffiliated entities.





- McCONNELL & Co., INC. PRIVATE CLIENTS GROUP \*
- McCONNELL, ROTHMAN & Co., P.C. CERTIFIED PUBLIC ACCOUNTANTS
- HERITAGE MORTGAGE COMPANY, INC.

*\*Securities offered through 1st Global Capital Corp., Member FINRA, SIPC.  
Investment advisory services offered through 1st Global Advisors, Inc.*

*Massachusetts Mortgage Broker # MB1203*

*The McConnell Group of Companies and 1st Global Capital Corp. are unaffiliated entities.*



*“At The McConnell Group, you’ll receive the advice and guidance you need to chart a course for your financial future. We offer the convenience and leverage of having three financial services – accounting and tax preparation, financial planning, and mortgage financing – together under one roof.”*

Michael R. McConnell, CPA

## Three financial services companies together under one roof.

At The McConnell Group, you’ll receive the advice and guidance you need to chart a course for your financial future. We offer the convenience and leverage of having three financial services – accounting and tax preparation, financial planning, and mortgage financing – together under one roof.

The combination of these three services brings all of the financial puzzle pieces together so that you have a complete understanding of your financial profile. Whether you are just starting out, have already accumulated significant assets, or are looking toward retirement, we can help you work toward and attain your financial goals.

We are committed to providing all of our clients with the highest standards of professionalism, expertise, and experience. We take the time to understand your unique financial situation and develop a comprehensive plan to help you turn your financial goals into reality. Contact us today for your complimentary initial consultation.



## McConnell & Co., Inc. Private Clients Group

INVESTMENT PLANNING  
RETIREMENT PLANNING • ESTATE PLANNING

Securities offered through 1st Global Capital Corp., Member FINRA, SIPC.  
Investment advisory services offered through 1st Global Advisors, Inc.

The McConnell Group of Companies and 1st Global Capital Corp. are unaffiliated entities.

- We are able to offer the benefits and expertise of a big brokerage house with the hands-on attention and caring of a smaller, independent firm.

At **McConnell & Co., Inc. Private Clients Group**, we're able to offer the benefits and expertise of a big brokerage house with the hands-on attention and caring of a smaller, independent firm. We offer a comprehensive approach to financial planning that includes investment planning, retirement planning, estate planning, income protection, asset protection, business planning, educational planning, debt management and special needs planning. As an independent firm, we're able to offer products and services across the full range of financial planning vehicles.

The first step we take with our new clients is to review your current situation and your goals for the future. Based on our discussion, we develop a plan for you, review it with you to make any necessary changes, and then help you put that plan into action. We work with clients through all phases of their financial lives, from those just beginning to invest, to those who have achieved substantial wealth. We treat all of our clients with the same care and attention to detail.

If you are already a customer of The McConnell Group's accounting and tax preparation or mortgage services, you can also enjoy the added benefit of having your other financial activities and documentation easily integrated into the guidance you receive.

Securities offered through 1st Global Capital Corp., Member FINRA, SIPC.  
Investment advisory services offered through 1st Global Advisors, Inc.

ACCOUNTING AND TAX PREPARATION SERVICES



McConnell, Rothman & Co., P.C.  
CERTIFIED PUBLIC ACCOUNTANTS

- Our CPAs are renowned for their knowledge, accuracy and friendliness.

McConnell, Rothman & Co., P.C. offers expert services for all of your accounting and tax preparation needs. Our CPAs are renowned for their knowledge, accuracy and friendliness, and come from a wide variety of employment and educational backgrounds.

Our services include, but are not limited to, bookkeeping, tax return preparation, financial statement preparation, and tax planning. We are well-versed in the most current tax laws affecting individuals, corporations, partnerships, trusts and non-profit organizations. Based on your financial situation, we can help you identify the best accounting and tax planning services for your needs.

If you are already a customer of The McConnell Group's financial planning or mortgage services, you can also enjoy the added benefit of having your other financial activities and documentation easily integrated with your tax advice and information.

MORTGAGE BROKERAGE



## Heritage Mortgage Company, Inc.

R E S I D E N T I A L • C O M M E R C I A L

Massachusetts Mortgage Broker # MB1203

- Whether you are buying your first home, trading up, or looking to refinance, we can help you meet your goals.

Heritage Mortgage Company enjoys a reputation for superior service and financial expertise. Whether you are buying your first home, trading up, or looking to refinance, we can help you meet your goals with low rates and a broad mix of traditional and unique loan products for home financing.

Our extensive industry experience enables us to answer any questions that might arise, as well as navigate more complex mortgage situations, such as self-employment or previous credit issues. We are committed to making sure your experience with us is as smooth as you would expect from an experienced, regional leader.

You can also benefit from The McConnell Group's and accounting and tax preparation or financial planning services that can help you make the most of your investment in your new home or property.

Massachusetts Mortgage Broker # MB1203



*"I've had great success and trust with the group and I'd recommend them to friends...I always got the impression that they were interested in working with me for the long term and not putting me into a quick hit and run strategy...We developed a personal relationship from the beginning and they know me as a person and my financial goals...Based on past success, I will always be willing to listen to future opportunities."*

**Jack Tretton, President and CEO, Sony Computer Entertainment America Inc.**



*"They have always been very attentive and helpful and have made excellent recommendations in terms of financial planning and outside advisors to assist us when needed. My personal experience has had involvement at every level of the sports industry as player, union negotiator, team owner, agent for professional players and now sports investment banking. McConnell Rothman has proven to be very knowledgeable every step of the way. I am also aware of many other sports clients they have who have utilized their services for many years."*

**Randy Vataha**



*"Mike has grown with my family by putting himself in my shoes and providing individualized attention. He's not waiting for me to call. He's being proactive and acting as my conscience. I've always had confidence and I trust him to think about about my investments, make sure I know the options available to me, and help me choose what's appropriate for my family."*

**Smaiyra Million**



*"I've never had an issue with the IRS even though I am not a good record keeper and I'm a constant procrastinator. They make it easy for me. When I first came into the league, I started investing in real estate and I had a real need for someone to do my taxes. McConnell Rothman has been a great investment for me."*

**Timothy Fox**



*"They are always available, giving you extra time when you need it. They are very accessible and take a real personal interest in your situation. I always feel like I have been well taken care of. I've been with McConnell Rothman for 30 years and I hope to be with them for another 30. You just can't get any better."*

**Angelica (Jill) Leone**



*"This has been a great relationship. He calls me about something that he knows would have a bearing on me. He's always sharing tips he read that would help me. Since I've been with Alan, his approach hasn't changed. He's not only a good professional, he's a good friend and he always has my best interests at heart. Everybody that works with them should know that. He's straightforward with what he does for you. He does it very conscientiously and conservatively. Any time I've needed something, he's been there."*

**Bill Lenkaitis**



- McCONNELL, ROTHMAN & Co., P.C. CERTIFIED PUBLIC ACCOUNTANTS
- McCONNELL & Co., INC. PRIVATE CLIENTS GROUP \*
- HERITAGE MORTGAGE COMPANY, INC.

McConnell,  
Rothman & Co., P.C.  
CERTIFIED PUBLIC  
ACCOUNTANTS

**Michael R. McConnell, CPA**  
PRESIDENT



175 Derby Street, Suite 36  
Hingham, MA 02043  
Tel: 781-740-5000  
Fax: 781-740-2200  
mike@mgroup3.com