



## COMPANY FACT SHEET

CIA Financial Group has been providing individuals, families, business owners, and corporate executives throughout Michigan with unparalleled service and a range of financial services very few firms can offer. With a wide range of services, CIA Financial Group is Your Source for Comprehensive Financial Services.

- CIA Financial Group was founded in 1975 as Commercial Insurance Agency, Inc.
- Large professional staff.
- Average tenure for employees at CIA Financial Group is 8-10 years.
- More than 5,500 personal, commercial, and group clients.
- CIA Financial Group is a Registered Investment Adviser (RIA).
- All employees of CIA Financial Group receive regular training and education on the latest trends and strategies relating to their respective departments.
- CIA Financial Group and staff members are licensed in the State of Michigan, among others.
- CIA Financial Group offers educational programs to companies throughout Michigan, and their employees, on a range of financial issues.

### Five distinct service departments, including:

- Personal Insurance Services
- Commercial Insurance Services
- Financial Planning & Investment Services
- Mortgage & Financing Services
- Employee Benefits Services

### The key individuals who manage the specific service areas, include:

- James Kunath – *Commercial Insurance Services*
- Sam Crudo – *Employee Benefits Services / Personal Insurance Services*
- Michael Clancy – *Financial Planning & Investment Services\**
- Michael Simonds – *Mortgage & Financing Services*

### CIA Financial Group is affiliated with a number of professional and civic organizations, including:

- National Association of Professional Insurance Agents
- Michigan Association of Insurance Agents (MAIA)
- Independent Insurance Agents Association
- The Rotary Club
- Knights of Columbus
- Chambers of Commerce throughout Michigan
- Michigan Mortgage Brokers Association
- National Association of Health Underwriters

\* Registered Representative offering securities through Mutual Service Corporation Member NASD/SIPC.  
Advisory Services offered through CIA Financial Group A Registered Investment Advisor.  
CIA Financial Group, Inc. and Mutual Service Corporation are separate companies.

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