ABOUT OUR FIRM

Our vision

Our goal is to be the trusted advisors that clients turn to for help with growing and protecting their financial resources.

What we do

As investment adviser representatives of Commonwealth Financial Network®, the CPAs at ATI Financial Services create, implement, and monitor customized financial plans designed to help individuals and families pursue their financial goals. We thoroughly assess and analyze your entire financial picture to ensure that your savings, investing, tax, and retirement strategies reflect your values, risk tolerance, and ultimate life objectives.

Our approach

We're known for taking a conservative, tax-efficient approach to wealth management. We've built a reputation based on sound judgment and prudent decision making—values that have helped many of our clients grow and protect their existing assets and successfully pursue their goals.

The benefits of independence

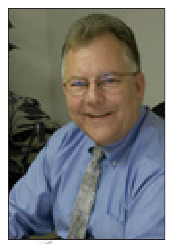
Our commitment to always putting your interests first is evident in every aspect of our business. We've chosen to partner with Commonwealth Financial Network, an independent broker/dealer with a 30-year history of focusing solely on the needs of its affiliated advisors and the clients they serve. This partnership means that we remain free to make recommendations based solely on what's right for you, without bias or pressure to promote a particular product or strategy—which is not the case with some other types of financial advisors.

Services we provide

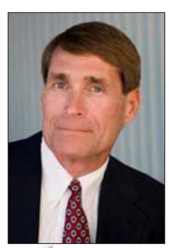
- Investment management
- Tax preparation and planning
- Retirement planning
- Education planning
- Post-retirement income planning
- Insurance planning
- Estate planning
- Charitable giving strategies
- Coordination with other professionals, such as attorneys and bankers, to ensure that your entire team is working toward common goals

Our team

Our core group of dedicated professionals shares the common goal of providing you with the expertise, sound judgment, personalized service, and comfort level you need to confidently pursue your financial goals.



Ralph E. Duckworth Jr., CPA
BA in Economics, Carnegie Mellon University
MBA, University of Pittsburgh



Thomas R. Butler, CPA
BA in Accounting, College of William and Mary
MBA, Duquesne University

Your Building Blocks For Financial Success

ATI

Accounting · Taxes · Investments

2009-2011: Based on 9 criteria including: customer service, integrity, knowledge/expertise, communication, value for fee charged & overall satisfaction. 2012, 2013, and 2014: Based on 10 objective eligibility & evaluation criteria including: minimum of 5 years as an active credentialed financial professional, favorable regulatory & complaint history, accepts new clients, client retention rates, client assets administered, education & professional designations. These awards are not indicative of the wealth managers' future performance. Your experiences may vary. For more information, please visit www.fivestarprofessional.com.

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