

# Company Profile

Profectus: Latin for Accomplish, Growth, and Success

## Business Profile

Since 2012, our mission has been creating long-lasting relationships and working in partnership with our clients to accomplish goals for:

- Retirement Income Planning (Accumulation to Distribution)
- Asset Protection Planning (Captive insurance Company Planning)
- Build Legacy (Estate Planning)
- Minimize Tax Liability (Advance Pension for Business Owners)
- Charity Planning (Advocate Charitable Contributions with Tax-Benefits)

**Profectus Financial & Insurance Services** provides business owners tax-saving strategies to minimize liabilities and maximize investment options to increase profitability. We offer risk management, business succession planning, personal asset protection planning, retirement planning, and employee benefit planning.

**Profectus Wealth Management Company** is our Registered Investment Advisory (RIA) company. Our clientele consists of business owners and individuals with high net-income/net-worth. We determine short and long-term financial goals and offer guidance on pre-tax and post-tax financial investments that could generate higher-yield and lower-risk by providing a diversified asset portfolio. Our client portfolios consist a mix of insurance-based products, traditional and alternative investment options. We understand the importance of retirement income needs, asset protection, and tax-saving needs – all paramount to wealth and financial success.

## Areas of Expertise

Providing risk management, asset protection, and alternative investments through

- Advanced Pension Planning
- Retirement Planning
- Charitable Planning
- Captive Insurance Planning
- Alternative Investments Using Self-Directed IRAs
- Insurance Planning

## Quick Facts

- 2012 – Profectus Financial & Insurance Services
- 2013 – Profectus Wealth Management
- Headquarters: Los Angeles, CA
- Employees: 8
- Clients throughout Southern California, Nevada, Arizona, Georgia, and Alabama
- Multi-lingual firm (Fluent in English, Russian, and Korean)

## Management Team



**Kelly Woo**  
Co-Founder & Principal  
• CFP®, MDRT, Licensed in Investments and Insurance, Frequent Speaker at conferences/radio shows/webinars



**Aleksander Dyo**  
Co-Founder & Principal  
• MDRT, Licensed in Investments and Insurance, Frequent Speaker at conferences/radio shows/webinars

Profectus Financial | Profectus Wealth Management  
1055 W. 7th St Suite #3260 Los Angeles, CA 90017

[www.ProfectusFinancial.com](http://www.ProfectusFinancial.com)

Email: [info@profectusfinancial.com](mailto:info@profectusfinancial.com)

Phone: 1.800.811.6611 | 1.213.480.9400

