



A&I FINANCIAL SERVICES LLC

Grow your wealth, protect your hard work and choose how you want to be taxed SM

Karl Frank, Certified Financial Planner[®], MSF, MBA, MA *Karl@AssetsandIncome.com*

Karl Frank, Certified Financial Planner[®], is the President of A&I Financial Services LLC. Karl helps a small number of successful business owners and families grow and protect their investments and choose how they want to be taxed.

Leadership, Licenses, and Affiliations

Karl is a leader in the Denver business and financial planning communities. He sits on the Board of Directors for the Financial Planning Association (FPA) of Colorado and leads the public awareness and government relations efforts of the FPA. For many years, he ran the pro bono call-in session, KUSA Moneyline 9, on behalf of the FPA. Karl earned national recognition from the Financial Planning Association in 2012 when his peers nominated him as a "Leader in the Profession." His willingness to donate his time and "go the extra mile" for the community is featured in the *Journal of Financial Planning*.

He frequently appears on local television stations, including KCNC 4, KUSA 9, Fox 31 and others. Karl is also actively involved with the Metro Denver Chamber of Commerce. Karl is regularly featured in leading publications and contributes to the *Denver Post* and *Denver Business Journal*. His work with business owners was featured in several magazines.

In addition to his Certified Financial Planner[®] designation, Karl holds three Masters Degrees. He earned a Master of Business Administration and Masters of Science in Finance from the University of Denver, Daniels College and Reimann School of Finance. He also has a Master of Arts in English from the University of Colorado at Boulder. He holds FINRA securities licenses 7, 24, 52, 63, 65, as well as his life insurance license. Karl is a member of the Million Dollar Roundtable, earning Top of the Table honors from 2008-2011. Each year less than 30 advisors in Colorado achieve the Top of the Table distinction.

Karl loves mountain sports, especially hiking and skiing. He also enjoys golfing, writing, and woodworking. Karl, his wife and children live in Centennial, Colorado.

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"I am blessed to be the financial guide for some of the most amazing, caring people I have ever met."