

OUR FIRM

Thoughtful service and tailored strategies with your needs at the center.

Offering decades of experience, which we dedicate to crafting innovative, thoughtful financial strategies for clients. We take the time to get to know your lifestyle, goals and values, so that we can deliver a plan designed to propel you toward the future you've envisioned for yourself and your family. Offering a wide range of resources and the capabilities of a large corporation, we provide the tailored, attentive service of a small firm.

Access Advisors Mission

It is our mission to empower clients to achieve financial security.

We listen. We coach. You take control.

Let's collaborate to develop your financial plan to meet your needs and help alleviate anxiety about the future. We help you cut through the market jargon so you have a solid understanding of your financial options and work together to make educated decisions to assist you in reaching your financial goals.

About Level Four Financial

Level Four is an independent wealth management firm dedicated to changing the way financial advice is delivered. Their focus is on delivering objective, specialized, and proactive advice through comprehensive suite of services.

Access Advisors Team



Founder and Owner of Access Advisors, LLC, Amanda has over 30 years of experience in the financial services industry. A native of Manhattan, and alumna of Smith College, Amanda received her Master of Business Administration degree from Columbia University Graduate School of Business in the city of New York and began her career working on Wall Street for a boutique investment bank in 1980.

In 1996 Amanda started her own mortgage lending business in Sarasota, FL and in 2005 she opened her investment advisory firm. She has served as an Assistant Professor of Finance and International Business at Eckerd College in St. Petersburg and Sarasota, teaching business and investment finance courses.

Level Four Practice Directors



ASSET MANAGEMENT

TODD M. BULOT
PRACTICE DIRECTOR



ADVANCED PLANNING & BUSINESS SERVICES

LUKE BRITT, RICP®, CEPA®
PRACTICE DIRECTOR



FINANCIAL PLANNING

TERRY THOMPKINS, CFP®, CLU, ADPA®
PRACTICE DIRECTOR



CORPORATE RETIREMENT PLANS

DAVID BYRNES, AIF®
PRACTICE DIRECTOR



PROPERTY & CASUALTY

BRENT WHITE
PRACTICE DIRECTOR



PRIVATE CLIENT SERVICES

CHRIS FACKA
PRACTICE DIRECTOR

Securities offered through Level Four Financial, LLC Member FINRA/SIPC. Advisory services offered through Level Four Advisory Services, LLC, an SEC-registered investment adviser. Access Advisors, LLC, Level Four Financial, LLC and Level Four Advisory Services, LLC are independent entities.

OUR SERVICES

FINANCIAL PLANNING

- Advanced Planning
- Business Financial Planning
- Corporate Benefits Review
- Charitable Giving
- Divorce Care
- Education Funding
- Elder Care Planning
- Healthcare Planning
- Multi-generational Planning
- Personal Financial Website
- Pension Valuation
- Social Security Maximization

RISK MANAGEMENT

- Life Insurance
- Business Planning
- Disability Insurance
- Medicare Planning
- Long-Term Care Insurance
- Asset Protection Strategies
- Wealth Preservation Planning
- Estate Planning
- Asset-Based Long-Term Care

PRIVATE CLIENT SERVICES

- Comprehensive Oversight
- Concierge Service
- Family & Entity Governance
- Family Philanthropy
- Foundation Planning

ASSET MANAGEMENT

- Asset Allocation Models:
 - Aggressive Growth
 - Growth
 - Growth & Income
 - Income & Growth
 - Income & Preservation
- Equity Portfolios:
 - U.S. Large Cap Growth
 - U.S. Large Cap Value
 - International American Depository Receipts
 - Master Limited Partnership
 - Real Estate Investment Trust
- Fixed Income Portfolios
 - Total Return Municipal
 - Intermediate Maturity Municipal
 - Limited Maturity Municipal
 - High Income Intermediate Maturity Municipal
 - Taxable Fixed-Income
 - Separately Managed Solutions
- Portfolio Analysis
- Portfolio Investment Strategy
- Volatility Assessment

CORPORATE RETIREMENT PLANS

- 401(k)
- 403b/457
- Cash Balance
- ESOP
- Non-qualified Plans
- Profit Sharing
- Retirement Readiness
- Safe Harbor

BUSINESS SERVICES

- Executive Benefits
- Employee Retention
- Strategies
- Tax Planning
- Insurance Planning
- Owner-Driven Retirement Planning
- Qualified Retirement Plan Consultation
- Buy-Sell Agreement Review & Consultation
- Exit & Transition Planning
- Employee Health Benefits

PROPERTY & CASUALTY

- Commercial Insurance
- Home & Auto Insurance
- Professional Liability
- Cyber Insurance
- Crime Insurance
- Excess Insurance
- Business Continuation Insurance
- Key Person Insurance
- Directors & Officers Liability
- Merger & Acquisition Services
- Policy, Coverage & Contract Reviews

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