

# Sean E. Savage

PROFESSIONAL WEALTH MANAGEMENT



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# savage



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Professional Wealth Management

## **Objective Advice**

The financial advice provided, and portfolio research is independent and objective.

## **Client Centered**

Our commitment to you is THE priority. The fiduciary standard is applied.

## **Results Driven**

Our focus is on your long term financial program and portfolio performance. The performance results are shared with you in each review meeting and on each client statement.

## **Fee-Based Service**

Our fee-based advisory service delivery system is consistent with a client-centered approach with transparent and competitive fees.

\$600,000 minimum investment please.

# Sean E. Savage ChFC,<sup>®</sup> AIF<sup>®</sup>

## Professional Wealth Management Process<sup>™</sup>

1

### **Initial Financial Meeting**

I first listen to you to learn more about your financial picture, goals, and investment history. You will learn about how I engage my clients.

2

### **Financial and Portfolio Analysis**

I spend time analyzing your financial picture and formulate key planning items to discuss. Morningstar<sup>®</sup> Associates software is used to analyze your current holdings, asset allocation, and fee structure.

3

### **Aggregate Information Gathering and Proposal Generated**

Feedback is provided to you from our analyses. A risk assessment questionnaire is completed with you in order to generate appropriate recommendations and a Wealth Management proposal.

4

### **Implementation**

An advisor managed portfolio is established and financial objectives set as a result of steps 1, 2, and 3.

5

### **Ongoing Support and Regular Strategic Meetings**

You and I reach an understanding on how many personal meetings will be conducted each year to review your financial picture, goals, and portfolio. You have 24-hour-a-day worldwide access to your portfolio online, as well as personal support from the service team in my office.





"I view it as a privilege and responsibility to serve others with my time, talent, and resources for the greater good."

**Sean E. Savage ChFC,<sup>®</sup> AIF<sup>®</sup>**  
**Professional Wealth Management**  
**Your Fiduciary**

A fiduciary is in a special position of trust in managing assets for others. You deserve a fiduciary who will put your financial interest first.

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**Our vision is to improve the lives of all we serve.**

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