Sean Savage
Ryan Savage

PROFESSIONAL WEALTH MANAGEMENT

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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.

Sean Savage ChFC,® AIF®
Ryan Savage
Professional Wealth Management Process™

1

Initial Financial Meeting
We first listen to you to learn more about your financial picture, goals, and investment history. You will learn about how we engage our clients.

2

Financial and Portfolio Analysis
We spend time analyzing your financial picture and formulate key planning items to discuss. Morningstar® 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
We will 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 our practice.

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

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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.