Sean Savage, CFP

PROFESSIONAL WEALTH MANAGEMENT

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

-Sean Savage, CFP

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

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Sean Savage CFP®

Certified Financial Planner
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.

$700,000 minimum investment please.

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Professional Wealth Management Process™

As a CFP professional, I am committed to a high standard of care and service to my clients and this five-step planning process delivers on this commitment.

1 Gain an Understanding of Your Financial Circumstances

In the initial meeting, we **listen** to you to learn more about your financial picture, goals, dreams, and investment history. You will learn more about how we engage our clients.

2 Initiate Process to Identify Goals & Begin Construction of a Plan

Also in the initial meeting, we will begin to discuss goals and a possible framework around a plan to achieve the goals.

3 Analyze Your Financial Picture & Portfolio

We spend time analyzing your financial picture and formulate key planning items to help work towards financial goals. Morningstar Associates software is used to analyze your current holdings, asset allocation, and fee structure.

4 Provide Analyses Feedback, Risk Assessment, & Generate Investment Recommendation Proposal

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.

5 Recommendation Implementation

Final recommendations are made and implemented. An advisor managed portfolio is established, and final financial objectives set as a result of steps 1, 2, 3, and 4.

6 Provide Ongoing Support & Hold Regular Strategic Meetings

Together, we set the number of meetings that will be conducted each year to review your financial picture, goals, and portfolio. You have worldwide access to your portfolio online and personal support from the service team in our office.