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INVESTMENT ADVISORS (HTTP://SGLIA.COM) CAREERS CONTACT US (/CONTACT-US) EVENTS (/NEW-EVENTS-1)

What matters most to you, matters most to us.

SG LONG FINANCIAL

SG Long Financial is an employee owned financial services firm serving the needs of individuals and institutions in 45 states across the United States. SG Long Financial was founded over 30 years ago by a group of five entrepreneurs that decided to leave large corporate America to build a full service brokerage that served the community and treated clients like family. We pride ourselves in offering a five-star service model that allows for customization while adhering to a high standard of ethics, integrity and transparency in everything we do. Both our individual and institutional clients appreciate our ability to customize products, services, reporting and portfolio management to meet their unique needs.

At SG Long Financial, we provide a full suite of investment management strategies through our affiliate SGL Investment Advisors (SGLIA). A unique feature of SGLIA is our experienced in-house professional research team. The team is always accessible to clients by phone or in person

CLIENT LOGIN:

SCHWAB (HTTP://SCHWAB.COM)

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START COMPLIMENTARY CONSULTATION (HTTPS://VISITOR.R20.CONSTANTCONTACT.COM/LLR=SQPUMJ9AB&P=OI&M=1127744159250&SIT=1127744159250/B302-40B4-B40B-556AB703)



SGL Investment Advisors offers SG Long Financial clients seven composites spanning the entire risk-tolerance spectrum.

as our portfolio managers and analysts enjoy the personal interaction with clients and welcome the opportunity to speak directly about the holdings in client's portfolios. SGLIA manages seven strategies including equity, balanced and fixed income portfolios that allow our managers the ability to accommodate numerous client risk profiles.

At SG Long Financial, we also provide traditional services in a brokerage environment through our affiliate SG Long & Co (SGL). SGL is a full service Broker/Dealer (member FINRA/SIPC) and offers a full suite of products such as individual stocks, bonds, mutual funds, exchange traded funds, unit investment trusts, annuity and insurance through our team of highly skilled financial advisors. Through this service we also provide estate planning, tax planning, retirement planning in partnership with a client's CPA, attorney and other advisors. Collectively, our Financial Advisors have over 100 years of experience in assisting clients with retirement plans, estate planning and solutions, business planning or individual brokerage services.

Our goal is to guide our clients as they search for the expertise of a professional investment management team regardless of the size and risk profile of their portfolio. We work each day to exceed the expectations that the investor has by providing a high level of service, flexibility and competence in meeting our clients requests for information, guidance and service.

CONTACT

Phone: 406.721.0999

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UPCOMING EVENTS ([HTTPS://WWW.SGLONGFINANCIAL EVENTS-1/](https://www.sglongfinancial.com/events-1/))

► LOCATIONS

- 283 West Front | Suite 302 Missoula, MT 59802
- 675 Town Square Blvd | Suite 200 Garland, TX 75040

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