

# Find Your Path to **Economic Freedom**<sup>TM</sup>

HOW WE CAN HELP

## Schedule a Complimentary **Wealth Coaching Session**

A no cost or obligation phone consultation to assess your financial situation and formulate next steps for achieving economic freedom.

[SPEAK WITH AN ADVISOR](#)

## Listen to our latest **Podcast**

The Science of Economic Freedom is an educational podcast providing expertise on how to reach your financial goals.

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# We're Recognized as a Top Financial Advisor

Mercer Advisors is proudly recognized as one of the top wealth managers in the United States.

[SEE OUR AWARDS](#)

# Investing for women, by women

We're committed to serving women's comprehensive wealth planning needs.

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INVESTMENT MANAGEMENT



FINANCIAL PLANNING



ESTATE PLANNING



TAX PLANNING & PREPARATION



# Comprehensive Wealth Management

Freedom to enjoy, freedom from anxiety, freedom to give back. The confidence knowing your lifetime journey is on a path for success – this is what a holistic wealth management plan can do for you. As a full-service wealth management firm, Mercer Advisors helps you with all aspects of your financial life, from customized financial planning and investment strategies to proactive tax planning and preparation, retirement planning, estate planning, and corporate and family trustee services, we have your life journey covered. We build a strategy just for you. Our team of CPAs, CFPs, and lawyers, come together to support your relationship manager, helping you to navigate the ups and downs of the market, changing tax laws, early retirement, college bills, and so much more, with an unwavering focus on delivering best-in-class advice, acting as a fiduciary to you.

SCHEDULE A WEALTH COACHING SESSION ?

First Name

Last Name

Email

**CONTACT ME**

We help you through every stage of your financial

Building Wealth

Preserving Your Family Life

Enjoying Retirement

Continuing Your Legacy

## Giving you a foundation to build on

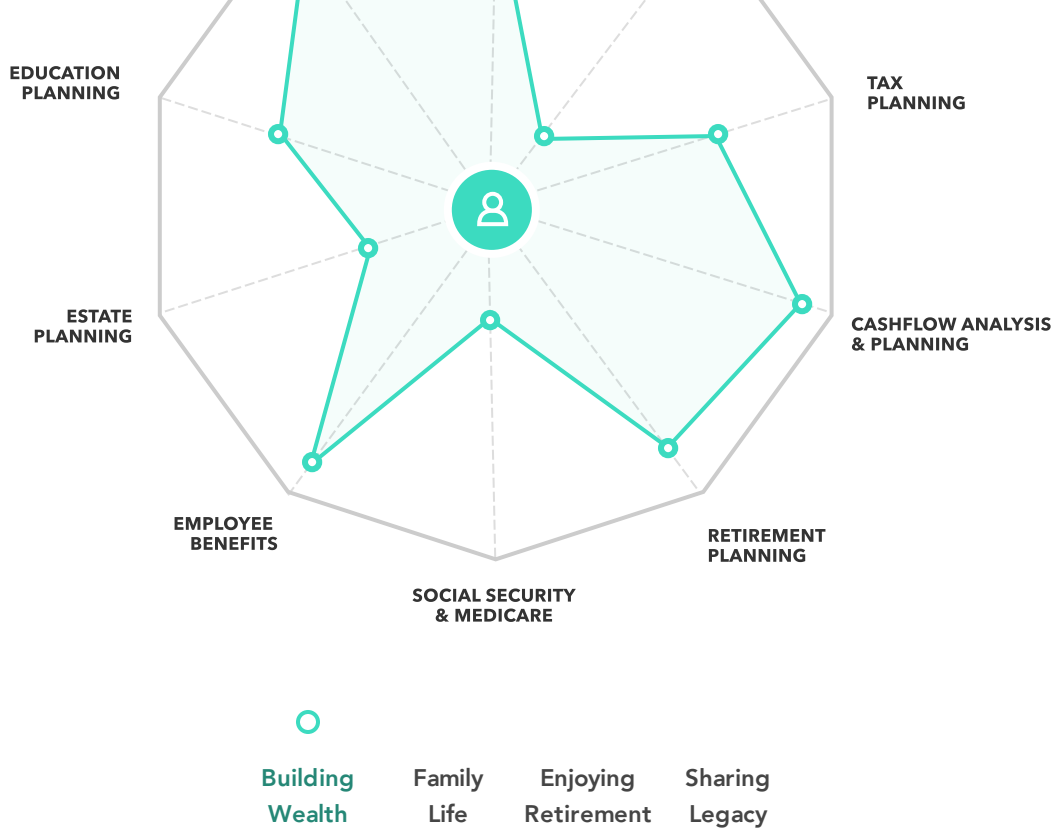
It's never too early to start saving and planning for your future. We'll work with you to build a foundation for financial success.

# Customized Financial Planning

Life changes. So, too, do your goals and objectives. Your financial plan is most effective when you treat it as a lifelong process, making periodic adjustments throughout your journey. At Mercer Advisors, we believe the first step in this process is to consider your wealth management needs holistically. We work with you on a fee-only fiduciary basis to assess and integrate all aspects of your financial life into one comprehensive plan.

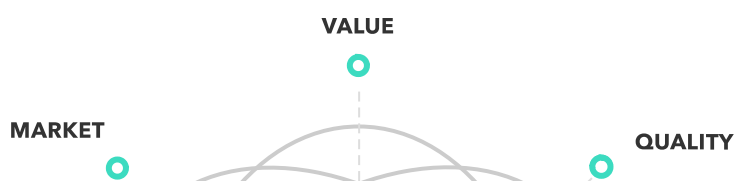
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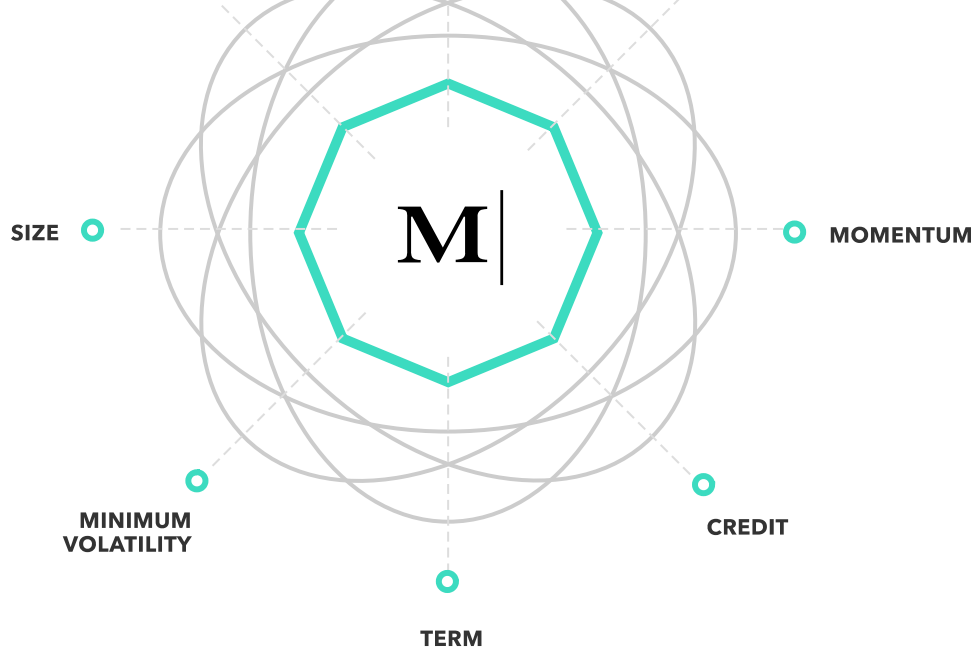




# A Scientific Approach to Investment Management

At Mercer Advisors, our investment philosophy is guided by scientific reasoning and theory; not subjectivity and speculation. As fiduciaries to our clients, we recommend only those investment solutions which we believe to be the best available. Our science-based approach to investing focuses on identifying those characteristics of investments that have been shown, over time, to be reliable predictors of superior, risk-adjusted returns. While this **factor-based approach** doesn't guarantee that such investments will deliver positive future returns, decades of academic research has concluded that building portfolios in this manner leads to higher risk-adjusted returns than does "active" management, market timing, and traditional index investing.





## One Relationship. A Team of Experts.

Our advisors are committed to you, to our philosophy, and to ensuring our clients get the right strategy, plan, and attention according to their unique needs. Our team of wealth management experts including, **CERTIFIED FINANCIAL PLANNER™** professionals, investment advisors and strategists, estate planners, attorneys, and Certified Public Accountants, will collaborate with you and foster a relationship based on trust, service, and transparency. At Mercer Advisors, our commitment is to you.

**MEET THE TEAM**



ARTICLES

## New Tax Laws and Credits That May Impact Your Family

We have now had a full year with The Tax Cuts and Jobs Act, which enacted many significant changes for taxpayers. For families, especially those with children, it's important to know how these laws may impact your financial planning. As a working woman and a mother of two, I was pleased to learn that some of the new tax law changes will be helpful in planning expenses and future savings for my children. To help you think strategically about your tax planning, we have outlined some of these changes. Talk to your advisor about how these changes may affect your taxes.



**Irina Polyakova, CPA**  
Mar 1, 2019

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ARTICLES

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# January 2019 Capital Markets Outlook

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ARTICLES

## Deciding to Retire?

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# Talk to Us.

FIRST NAME

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LAST NAME

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EMAIL

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PHONE NUMBER

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MESSAGE

**SEND**



 888.565.1681

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- Investment Management
- Financial Planning
- Estate Planning

**WHO WE ARE**

- Our Story
- Our Philosophy
- Awards and News

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Advisors

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Financial Education

Women and Wealth

The Science of Economic Freedom

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