Strassman & Assoc.
Wealth Management | Your Legacy Matters

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LOOKING FOR CLARITY AROUND YOUR FINANCIAL FUTURE?

John Strassman is a CERTIFIED FINANCIAL PLANNER™ Professional in Bend, Oregon with over 30 years of Investment and Insurance experience! You deserve a Personal Financial Advocate with real-life experience to help you navigate through the financial uncertainty you may be feeling. For over 30 years, John Strassman (Certified Financial Planner™ Professional) has been providing investment and insurance professionally to individuals and families so they can plan and enjoy what is really important in life.

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CLICK HERE TO DOWNLOAD MY FINANCIAL CHECKLIST

HORIZON NAMED TOP ASSET MANAGER OF THE YEAR!*

Horizon has been named "2018 Asset Manager Of The Year (≤ $25B AUM)" by the Money Management Institute (MMI) and *Barron's*.

Money Management Institute

BARRON'S

INDUSTRY AWARDS

CLICK HERE TO LEARN MORE ABOUT HORIZON ASSET MANAGEMENT

MID-YEAR FINANCIAL OUTLOOK FOR 2018

Independent Wealth Management and Fee-Based Wealth Management

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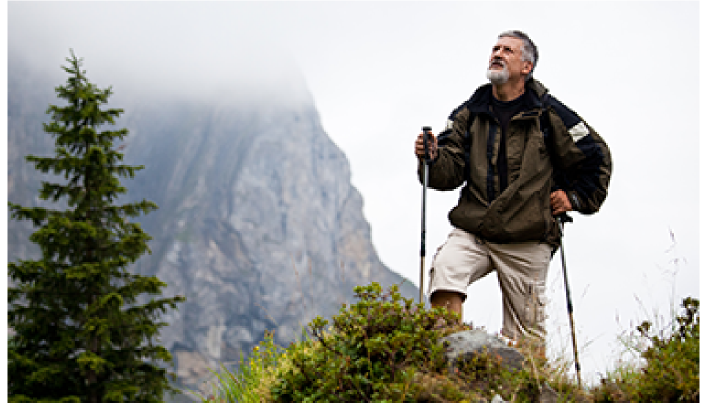

Independent Financial Planningand Fee-Based Financial Planning

Our fee-based approach to wealth management means implementing investment strategies that incorporate financial planning, investment portfolio management and oversight of a number of aggregated financial services.

As fee-based financial planners we base our recommendation on carefully considered financial strategies. As your trusted advisors, we are committed to personal service and share your desire for carefully considered, conservative and easily understood approaches to wealth management and investment strategies.

Asset Management Investment Consultants

Our philosophy is based on developing life-long partnerships with our clients. We believe that fostering a deep connection enables us to fully understand your concerns, motivations & goals thus providing greater satisfaction and confidence regardless of market conditions and economic cycles

Estate Plannning

Estate planning often seems overwhelming, but it is one of the most important foundations of your overall financial plan. Wills, trusts, beneficiary designations, powers of appointment, property ownership, gifts, powers of attorney can appear complicated and anxiety-provoking. At Strassman & Associates, we feel it is one of our most important jobs to simplify the process and help reduce the worry. Through careful, knowledgeable planning, we can help reduce uncertainties over the administration of a probate and help increase the value of your estate by reducing taxes and other expenses.

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Retirement Planning

One of the greatest benefits of independent investing is the knowledge that you have planned to provide a retirement income that sustains your lifestyle. As CFP® Professionals, we believe in taking the long view, looking beyond short-term opportunities by seeking to create the best investment strategy for long-term appreciation and stability. Our fee-based financial planning approach allows us to personalize a program that addresses your individual needs, desires and aspirations for your retirement. Our investment approach is based on your personal goals, not a one-size-fits-all solution

Guided Wealth Portfolio

We'll oversee your plan, customized for you and designed to evolve as your life changes. If your goals shift, we're here to help. With our convenient, intelligent technology you can view your account's activity, track account performance, and update your individual plan, all in your personalized online portal. Strassman & Associates uses advanced investment strategies through daily monitoring and advanced trading techniques. We work to help reduce your taxes and help improve your portfolio.

CONTACT US

Come in for a visit and let's talk about what's important to you.

Call (541) 306-4570 or Email John@YourLegacyMatters.com

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