OUR APPROACH IS SIMPLE.

# Cornerstone Advisors is a fee-only financial planning and investment advisory firm based in Topeka, Kansas.

Our mission is to help you become financially successful by offering top-notch,

As comprehensive financial planners, we offer a broad array of planning services to help you achieve your goals. As fee-only registered investment advisors, we make specific investment recommendations based on your individual needs, circumstances and goals. We work for a flat fee or flat percentage – we don't make money when you buy into specific investments.

As fiduciaries, we follow standards that protect you. We are required to act in good faith in our clients' interests. We avoid conflicts of interest, and will disclose any potential conflicts of interest. We work hard to ensure the advice we provide is accurate. We put your interests first and foremost, before our own.

impartial advice based upon our years of education, experience and knowledge.

Our advisors know how the pieces of the financial puzzle fit together for our clients. As comprehensive financial planners, we examine all areas of your finances in order to build a customized plan for your specific goals.

## Schedule an introductory meeting

Call: 785.273.2685

Don Schwart Jeff Sorensen Mark Bucholtz

FINANCIAL SERVICES

We offer a wide range of personal wealth management strategies to individuals, families, and small businesses. Through our comprehensive financial planning process, we implement the appropriate strategy or service that fits your goals.

**Investment Management**

- Investment Strategies
- Comprehensive Portfolio Management
- Investment Plan with Asset Allocation
- Investment Monitoring/Performance

**Wealth Transfer Planning**

- Wealth Management
- Estate Planning
- Income Distribution
- Generational Education & Planning

**Tax Planning**

- Cash Flow and Tax Planning
- Portfolio Distribution Strategies

**Financial Planning**

- Retirement Planning
- Cash Flow & Budgeting
- Retirement/Income for Life Planning
- Life & Disability Insurance
- Long Term Care Planning
- Coordination with other Professionals

## DISCLOSURES

FORM CRS

FORM ADV

PRIVACY POLICY

BROKER CHECK

## LOCATION

## CONTACT

CALL: (785) 273-2685

6540 SW 10th Ave.

Topeka, KS 66615

Search this website

Copyright © 2021 · Cornerstone Advisors, Topeka, Kansas

Investment Advisory Services offered through Cornerstone Advisors, LLC, a Registered Investment Advisor

Website Design