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Stewardship Financial Advisors

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Welcome to Stewardship Financial Advisors, a comprehensive financial services firm committed to helping clients meet their long-term financial goals. We believe we offer an exceptional combination of experience and professional client services through our personal approach and qualified team. We believe that relationships are pivotal in the wealth management process, and that is why at Stewardship Financial, our clients always come first.

Georgia Financial Planning Services

ESTATE PLANNING

Estate planning is the creation of a plan for managing your wealth while you're alive, distributing it after your death and protecting it from probate and estate taxes. Stewardship Financial Advisors believes that at the core of financial planning is the creation of an estate plan that articulates your wishes, protects your family, minimizes taxes, and preserves your legacy for generations.

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RETIREMENT PLANNING

Whether you are planning ahead for a retirement 20 years away or perplexed at how to turn your retirement savings into a viable income stream, our trusted advisors are here to guide you on the right path to meeting your goals. At Stewardship Financial Advisors, we carefully consider your current and future cash flows in the context of your objectives, and assist you in making smart decisions.

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TAX PLANNING

Navigating the ever-changing world of tax strategies and compliance is a critical component of your financial planning needs. Our Financial Advisors regularly review your personal tax situation and assist you with maximizing tax-deferred savings, reducing current and future tax liabilities, producing tax-efficient income in retirement and minimizing investment-related taxes.

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ASSET PROTECTION

Financial planning begins by ensuring that a catastrophic event has been considered and prepared for from a risk-reduction standpoint. We will review and analyze your personal asset protection strategy and proactively manage your risk in an effort to protect your family from unforeseen events such as long-term care, elder care planning, premature death, accidents, disability or lawsuits.

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INVESTMENT MANAGEMENT

We believe investing requires a long-term perspective and unemotional discipline to avoid short-term mistakes that can derail even the best-laid plans. At Stewardship Financial Advisors, our investment management team works continuously to provide an investment strategy that integrates your personal financial plan, income needs, tax planning, and risk sensitivity to reach your long-term objectives.

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BUSINESS PLANNING

Over 98% of business owners do not know what their business is worth, likely because a formal appraisal process is extremely invasive, time consuming, and expensive. Furthermore, business owners face a slew of issues ranging from employee benefits to succession planning. We assist clients in navigating these basic concerns for business owners and unlock their full potential.

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HELPING PEOPLE TO BE GOOD STEWARDS OF ALL THAT HAS BEEN ENTRUSTED TO THEM

When it comes to financial planning, often times people mistakenly believe they need only be concerned with the value of their accounts and how they are invested. While this is an important component of one's household financial health, five key areas exist that should be coordinated and maintained for proper financial planning. If only one of the five key areas is addressed, people may find themselves exposed to unanticipated and unwanted outcomes in reaching their financial goals. Our firm is dedicated to coordinating the five areas of Estate Planning, Asset and Risk Management, Tax Planning, Retirement Planning, and Investments to help clients achieve clarity in their financial lives.

We serve a diverse set of clients from across the country. Our team is available to meet at any of our offices located in Atlanta, Stockbridge, and Peachtree City. Please call our office to set an appointment with one of our associates.

BEST-IN-STATE WEALTH ADVISORS
Forbes

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FT 300 Ranking June 2018

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