SRM ADVISORS
A WEALTH ADVISORY FIRM

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Family Wealth Management

Welcome, and thank you for your interest in SRM Advisors. We appreciate the opportunity to give you an overview of our company philosophy, our team members, and our services. We view the practice of **Family Wealth Management** as a holistic and individually customized, long-term relationship. Our focus is on you the client. Our mutual success is measured not by simple market performance but by success in meeting your unique, family financial management objectives. Please spend as much time as you need viewing the resources on this site and return as often as you like.

Build, Maintain and Protect Your Net Worth.

As you explore our web site, we hope you gain a clear view of the value of a long term advisor relationship. Whether you are still accumulating assets, maintaining and beginning to draw income from your assets and/or wanting to plan for transfer of assets as part of your estate planning, we are here to help you make good decisions. We offer all of our clients the following resources:

- **Focused** analysis and decision environment.
- **Independent** third party advice.
- Clarify **expectations** and set obtainable **objectives.**
- Access financial **expertise** and discipline.
- **Delegation** of follow up actions and recommendations.
- **Disciplined** selection, monitoring and evaluation of investments.
- Continuous client education.

We look forward to the opportunity to talk with you about your financial planning and investment management needs and objectives. We provide our services on a fee basis to maintain our neutral, objective analysis and advice. Our initial consultations with prospective new clients are always without charge.

SRM Advisors. The Right Team, The Right Relationship, The Right Choice.

The Value of a Bond

How interest rate changes influence bond prices.

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