

(http://strategicfinancial.services)

YOUR LIFE. OUR PASSION.

Building financial strategies centered around you

We Listen First, Then Plan with You



Establish Your Goals

When would you like to retire? Who are the people who are most important to you? What do you want your life to look like? We help you define your objectives so that we can help you realize them.



Education is Key

We analyze options from a large universe of financial strategies available to us because we understand what each recommendation can accomplish.



Personalize Your Plan

Whether you are a business owner or an individual, your goals are unique to you. And so is the financial plan and roadmap we explain them thoroughly, so you can create, implement and refine together with you through the years ahead.

STRATEGIC FINANCIAL SERVICES

Our firm's mission is to listen to you, help you evaluate your priorities, crystallize your goals together with you, provide education as a product-agnostic advisor, provide financial strategies, and build a custom plan around your vision and decisions. We then monitor your plan's progress using real-time tools and technology, and make adjustments as your life changes.

Whether you are a high-net-worth individual, an entrepreneur, a couple, or a growing family, we consider you part of our inner circle of friends and family. Our commitment is to you, your life and your best interests. Our alliance with BCJ Capital Management (http://bcjfinancial.com) brings another level of expanded resources and expertise to our team, allowing us to handle even the most complex estates.

"We are accredited, independent financial advisors with access to all the latest financial products, strategies and portfolio designs. But above and beyond that, we're here for our clients' life celebrations ... and we're here walking through difficult times, too."

- Deborah Sopher, Founder

(<http://strategicfinancial.services>)

[INDIVIDUAL FINANCIAL PLANNING \(HTTP://STRATEGICFINANCIALSERVICES/INDIVIDUAL-FINANCIAL-PLANNING/\)](http://strategicfinancial.services/individual-financial-planning/)

[BUSINESS PLANNING \(HTTP://STRATEGICFINANCIALSERVICES/BUSINESS-PLANNING/\)](http://strategicfinancial.services/business-planning/)

[MARKET COMMENTARY \(/#NEWS\)](#)

[RESOURCES \(HTTP://STRATEGICFINANCIALSERVICES/RESOURCES/\)](http://strategicfinancial.services/resources/)

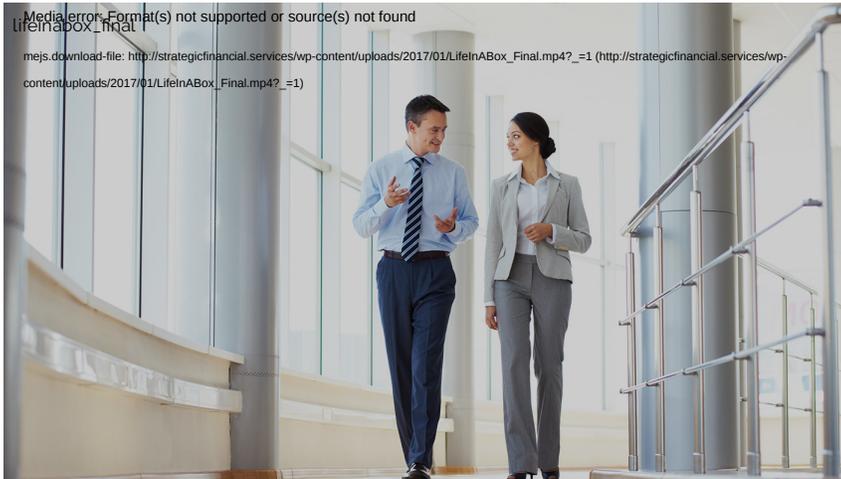
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Management System (http://strategicfinancial.services)

Our technology offers you access, transparency and a way to organize all of your most important documents in one secure location.

You can access your personal website 24/7 via the web to see your entire financial picture—investment performance, asset allocation, insurance coverage, 401(k) and IRA balances, retirement income and more. And a special password-protected, firewall secured digital "vault" area allows you to store and have convenient access to digital copies of your wills, trusts, insurance policies and other important documents.

Our wealth management system offers easy collaboration between your financial advisor, attorneys and CPA, so that we are all literally on the same page. Business owners can easily see their business and personal finances in separate areas.



Market Commentary

(<http://strategicfinancial.services>)

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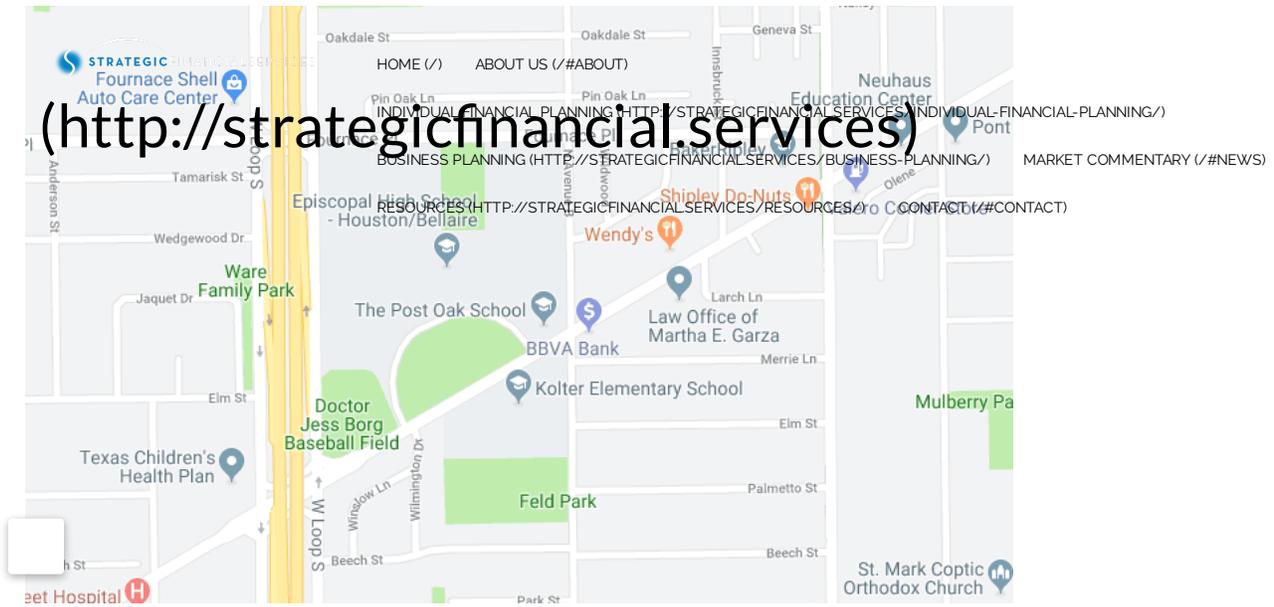


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Investment Advisory Services offered through BCJ Capital Management, a (SEC) Registered Investment Adviser.

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