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Trusted Advisors

Getting to know our clients' goals to help them simplify the complexities of their

About Us

We are dedicated to providing investment management and strategic wealth planning that is right for you. Simply put, we strive to be our client's trusted advisor.

Our Philosophy

As a firm, our focus is to add value to your financial life. We want to understand your goals and develop a plan that is customized to you.

Our Process

A strong planning process is the best way to create a more financially secure plan. We will meet with you to discover your

goals and how we can add value to your overall financial success.

Our Services

We advise our clients in the following areas:

Wealth Management

We offer a variety of services to help you to build and manage your wealth.

Investment Management

Evidence-Based Investment approach following the principles of Modern Portfolio Theory.

Retirement Plan Solutions

Solution and analysis of qualified plans for businesses of all sizes.

Our Team

Ken Coplen CPA/PFS

Director

Ken is the founding member of SFC Financial, LLC. SFC was founded to provide clients comprehensive financial planning an...

James Curran

CPA/PFS

Financial Planner

James earned a Bachelor of Science in Accounting from Truman State University. He's a certified public accountant (CPA)...

Sharon Stanton

Administrative Assistant

Sharon has been with SFC Financial, LLC from the early days.

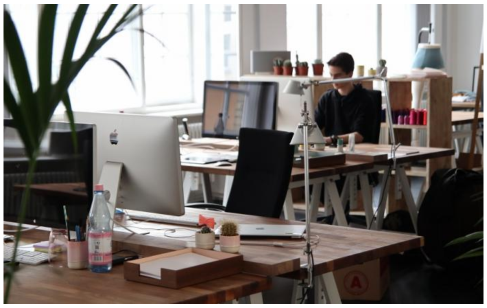
She is the dynamic force behind our technical software and...

Experienced Financial Planners working with Families and Businesses to Provide Investment And Wealth Management Services.

Blogs

Five Ways to Save on Healthcare Costs

SFC Financial | Feb 25, 2019



Top 5 Things 20-Somethings Need to Do

SFC Financial | Feb 25, 2019

10 Ways to Save Money

SFC Financial | Feb 25, 2019

Health

It's certainly no secret that healthcare costs have escalated in recent years, and there's no reason to believe that the end is in sight. But whether you have a comprehensive health insurance policy or have purchased a catastrophic policy, there are ways to save on healthcare costs. Here are just a few: 1. Stop going to the emergency room for minor illnesses. There are many reasons why going to the emergency room is a good...

Education , Savings , College , Lifestyle , Finance

If you're in your 20s, rejoice! You're in a great position to create the life you want, starting with a secure financial future. While it's common to feel

overwhelmed when entering the workforce full time, there are a lot of things you can do fresh out of college that will help you attain your professional and financial goals earlier than you may expect. Here are a few suggestions to help you get started: 1. Hone...

Education , Finance , Savings

While it may not seem so, there are a lot of painless ways to save money. Not just for those who have a limited cash flow, but also for those with plenty of surplus cash who will appreciate ways to cut back on monetary waste. Here are just a few things you can do to save: 1. Use cashback rewards credit cards. While most cards on the market today offer some level of cash back...

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CPA PFS Personal Financial Specialist

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FPA FINANCIAL PLANNING ASSOCIATION

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Subject

Message

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