Michael Brady & Co LLC
WEALTH MANAGEMENT

Planting a Seed

So You Can Pursue Your Passions in Life

Multi-Generational Wealth Management in Cleveland,

02:30

About Us

We serve as builders, keepers and stewards of multi-generational wealth for substantial families and the businesses, trusts and endowments they have created. **We advise, consolidate and simplify your financial life providing you with peace of mind and confidence in your financial future.**

We provide fee-only financial planning services along with fee-only investment supervisory services. We work best with families that are looking for an advisor to direct the investment of their assets and are willing to move investment accounts to our preferred custodian: Fidelity Investments.

Benefits of Working With a Fiduciary

informed as you work towards your family's goals and objectives increase your chances of achieving them. **To track your goals, we will measure your progress compared to your unique goals and objectives, not against a market index.**

You can sleep at night knowing that you are working in partnership with a team of professionals who understand your unique needs and situation and are dedicated to helping you achieve your personal objectives. When you leave the planning to us, **you and your family can enjoy an enhanced sense of security and a more fulfilling, purpose-filled life.**

How to Tell If We're a Good Fit for You

As your advisor, we want to get to know you and continually keep in touch. We tackle the day-to-day financial decisions so that you are free to do the things that matter most to you. We take a long-term management style towards your assets by keeping costs low while still having your assets invested in a sophisticated, state-of-the-art, pension-quality program. Our **Approach to Disciplined Asset Management™ (ADAM®)** instills confidence in us and how we manage your money.

If you want to make sure that the advice you receive is free from bias, that your advisors are not compensated from product commissions, loads or sales charges, and that your advisors are not affiliated with the products they recommend - then Michael Brady & Co. is a good fit for you.

Schedule a Meeting

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Are you managing your money in a way that improves your life?

Financial Planning

We work with you to create your Financial Road Map using a goals-based approach to outline your current financial position and model what the future might look like. We then help you implement solutions to provide the best opportunity for those goals to become reality. We utilize the latest technology like our Personal Financial Organizer (MyPFO) to help aggregate all of your financial and personal data to provide you with the most accurate and personalized Financial Road Map, which can be accessed on your desktop as well as mobile devices. We will also use MyPFO as our central hub for sharing documents via a secured Vault as well as share tasks, activities, and recommendations.

Get Started Today

Your Financial Road Map may include the following:

Budgeting, Cash Flow, and Debt Analysis

Net Worth Review

Asset Allocation & Asset Location Review

Education Planning

Insurance Analysis

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Retirement Planning

Employee Benefit Review

Long-Term Care Planning

Estate, Asset Protection, Charitable Gifting Planning & Review

Tax Planning

Business Planning

Social Security & Medicare Analysis

Investment Management

Our Approach to Disciplined Asset Management™ (ADAM®) is founded on the following key investment principles:

A defined set of **investment objectives** based on a thorough review of your investment time horizon, long-term goals and expectations, and short-term risk attitudes.

A diversified **asset allocation strategy** designed to meet your objectives with an acceptable amount of investment risk.

A process of **evaluating and selecting investments** based on factors including performance and cost reduction.

A method of carefully **monitoring investment activity** and adjusting and rebalancing the portfolio

Find Out Your ADAM® Risk Score

Fee-Only Advice

For our services, we are compensated by a fee that you pay us directly. **We do not sell any investment or insurance products and we do not receive any commissions or payments from anyone other than you.**

Investment Management Services are provided at the following fee schedule:

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Investable Assets	Fee
Up to $250,000	1.50%
$250,001 to $1,000,000	1.00%
$1,000,001 to $3,000,000	0.80%
$3,000,001 - $5,000,000	0.70%
Over $5,000,000	0.60%

Financial Planning Services are provided on an hourly fee-for-time basis. Our fee is $250 per hour for services provided by our Certified Financial Planner™ professionals. We may waive fees for Financial Planning Services for clients for whom we provide Investment Management Services.

Get Started Today

Map

My Personal Financial Organizer

In our search to consistently provide world class service to our clients we have created a state of the art web portal called My Personal Financial Organizer or MyPFO for short. **MyPFO allows you to aggregate all of your financial accounts to provide you with a consolidated view of your financial picture in a secure location.** Whether it be your mortgage, checking account, 529s, or your 401(k) at work, you will be able to see all of these accounts in MyPFO.

We will also use MyPFO to build and update your Financial Road Map. The Financial Road Map is your personalized financial plan that we will use to track your progress on achieving your specific financial goals. Want to know how funding your child's education will affect your retirement goals? The Financial Road Map will help us answer that question. Since you have already given us the vital information needed to answer that question, via MyPFO, we will be able to run a simulation and see in real time the effects of funding those future education costs has on your other goals.

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Cultivate the Best Life Experiences Imaginable

Meet The Team

Michael Brady & Co LLC
WEALTH MANAGEMENT

Michael Brady, MBA, CFP®

FOUNDER AND FINANCIAL ADVISOR

Cameron Brady, CFP®

FINANCIAL ADVISOR

Mercedez Hathcock, MBA

DIRECTOR OF OPERATIONS

Michael Brady & Co LLC
WEALTH MANAGEMENT

Join Our Mailing List

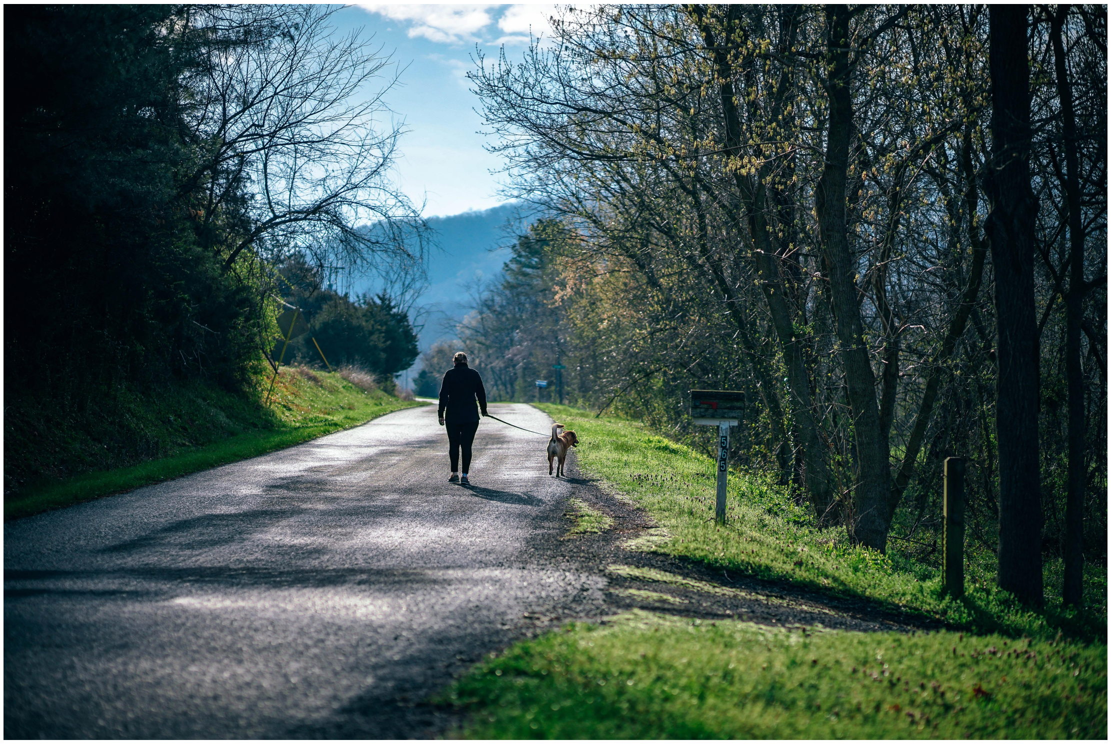
By submitting this form, you are consenting to receive marketing emails from: Michael Brady & Co., LLC. You can revoke your consent to receive emails at any time by using the SafeUnsubscribe® link, found at the bottom of every email. Emails are serviced by Constant Contact.

Sign Up!

Latest From Our Blog

We have focused this past couple of months on the ins and outs of Social Security. With its benefits accounting for over 40% of today's retiree's income, its reach touches and impacts many lives. Even though it is a vast system that many people partake in, it still brings about confusion and frustration for many. We would like to help assuage that confusion, turning trepidation into secure knowledge. The question we will tackle today is: When am I eligible for Social Security benefits?

RETIREMENT PLANNING



MARCH 18, 2019

Your Social Security Questions Answered

Social Security is a financial benefit given to retired workers. The system is funded with federal tax dollars from the Federal Insurance Contribution Act or FICA taxes. These taxes are taken directly from your taxable earnings. Each paycheck, 12.4% of it gets funneled into Social Security. If you are employed with a company, your employer pays 6.2% and you pay 6.2%. If you work for yourself, however, you are responsible for the entire 12.4%.

RETIREMENT PLANNING

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MARCH 5, 2019

Financial Tip Tuesday 3/5/2019

Not having a plan for your investments is a lot like driving on the highway blindfolded. Sure you might be heading in the right direction but you can't see what obstacles are in front of you. Your financial plan will help guide you into making important life decisions like buying a house, sending your kids to college, and retirement.

VIDEO, INSIGHTS, FINANCIAL PLANNING

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Let’s Have A Conversation

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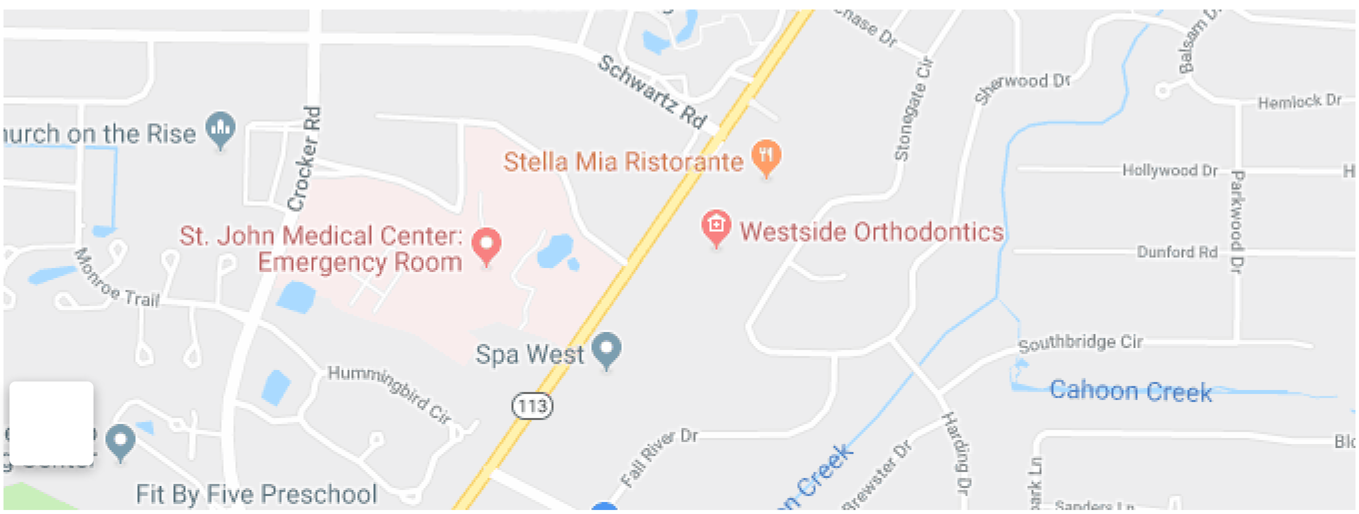
LOCATION

Michael Brady & Co. LLC
28871 Center Ridge Road, Suite 102
Westlake, OH 44145

CONTACT

(440) 235-2100



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