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FINANCIAL PLANNING AND WEALTH MANAGEMENT *FOR LIFE*

**Our mission is to help you live your best life
through comprehensive financial planning and wealth management services.**

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Skip Schweiss
@Schweiss_TDA

There it is, on Reg BI's Form CRS release, p.27. RIAs will not be able to use the word "fiduciary" to describe the standard of care they owe clients. Like brokers, they must use the phrase "best interest".



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OUR COMPANY

Lee Investment Management is an independent, fee-only, financial planning and wealth management firm dedicated to providing personalized advice to help clients achieve their life goals using values that are important to them. We are located in Saratoga Springs, NY and serve clients nationwide, including the greater Capital District of Albany, Schenectady, Clifton Park and Glens Falls.

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