



**in**

☎ (216) 642-1099



Financial Management Strategies, Inc. (FMS) is an investment advisory firm registered with the Securities and Exchange Commission (SEC). Through a firm-wide development of professional, proactive and on-going advisory relationships with our clients, our Advisers provide individual portfolio management, comprehensive financial planning, and fiduciary investment advisory services to retirement plans.

FMS and its Advisers take pride in providing these advisory services to our individual and corporate clients. We value the trust placed in us by our clients in helping each achieve their financial goals and planning objectives. Our mission is to provide these services professionally and with integrity, fairness, objectivity, and in the best interests of each client. As an advisory firm, FMS provides all services on a fee only basis. The scope of services to be performed are included in the investment management or planning agreement provided to each client. Please contact us for more information on how our advisory services could benefit you or your company.



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A comprehensive evaluation of an individual's financial state and the creation of a plan designed to meet the individual's personal needs and financial objectives.

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## **Asset Management**

Establishing the appropriate asset allocation and on-going monitoring of an investment account based upon an individual's financial goals and risk profile.

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Providing fiduciary investment services under Department of Labor regulations including fund selection and investment account management to retirement plan Trustees and Participants.

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**We'd love to help with any questions you may have.**

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## **Contact Us**

Financial Management Strategies, Inc.  
6200 Rockside Rd, Cleveland, OH 44131  
216.642.7878

Regulatory

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### **Contact**

Financial Management Strategies, Inc.

Office: (216) 642-1099

Fax: (216) 642-1186

9050 Sweet Valley Drive

Valley View, OH 44125

Series 6, 7, 24, 51, 63

[fmstrategies@plancorp.biz](mailto:fmstrategies@plancorp.biz)



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