

We maintain an intense client focus, which permits us to understand our clients deeply, and to serve them robustly.

We are a young and nimble, yet highly sophisticated, wealth management firm. We build relationships like we expect them to last for the rest of our careers. We dig deep to understand our clients' circumstances, concerns and goals, proposing answers to enhance financial success. Independent and objective, we provide unbiased advice focused on a client's best interests, sorting the entire marketplace to recommend optimal, tailored solutions at the most reasonable cost. Our clients tell us it is like having their own chief financial officer for their personal business.

We are a fee-only firm, which means that clients pay us to help maximize their wealth. Our firm does not receive commissions, bonuses or incentives from other institutions for referring their services. We are a fiduciary agent for our clients. We work comprehensively to integrate all facets of a client's financial life. Further, we work as adept coordinators when issues arise that require us to call on outside experts – from your team of trusted advisors or from our network of specialists in diverse disciplines, including investments, taxation and law.

**get in touch with us**

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Client Portal

**OUR QUARTERLY PERSPECTIVE**



returning  
optimism



looking ahead

Who are you? How can we help?

Who are we?