

PURTILL FINANCIAL

WEALTH MANAGEMENT & FINANCIAL ADVISORY SERVICES



(/)

[Home \(/\)](#)
[About \(/About\)](#)
[Who We Are \(/Who-We-Are\)](#)
[Services & Fees \(/Services-And-Fees\)](#)
[FAQ \(/Faq\)](#)
[Contact \(/Contact\)](#)

PURTILL FINANCIAL LLC



Wealth Management and Fee Only Financial Advisors

Welcome to Purtil Financial LLC

At Purtil Financial, we take responsibility for growing and managing your investment portfolio over the long term. The functions that we perform for our clients go beyond investment research and recommendations. We are a fiduciary, fee only, SEC-registered investment advisory firm that works strictly in the best interests of our clients. Our motivation is to help you achieve your financial and retirement goals.

How Can We Help?

- Investment management services, focused on your financial goals. As fiduciaries, we only have your best interests in mind.
- Comprehensive management fee includes all of our investment and financial planning services: portfolio selection, annual rebalancing, tax planning and advice, guidance on employer investment plans, basic financial plans with updates as needed, low cost fund selection, tax loss harvesting recommendations, portfolio and market updates, guidance and monitoring of required minimum distributions.
- Guidance on your investment assets, including your employer plans, retirement plans, and brokerage accounts.
- Globally diversified portfolio allocation across 20 different industry segments to reduce investment risk.
- Work directly with our advisory team and receive personalized service for your financial needs.
- Monthly reporting on financial results for your accounts and portfolio, compared to industry averages.
- Meetings with our advisory firm team as often as needed, no mandatory meeting schedules.

Recent News

On October 14, 2017, the Securities and Exchange Commission granted Investment Adviser registration to Purtil Financial LLC. Prior to this date, the firm had been registered in the States of Ohio and Florida.

Carly Purtil, CPA, obtains Personal Finance Specialist (PFS) designation from American Institute of CPAs ([/s/Carly-obtains-PFS-press-release-updated-10-28-16.pdf](#))

Purtil Financial named 2015 Rising Star firm by Accounting Today ([/s/Accounting-Today-2015-press-release.pdf](#))

- Asset management fees ranging from 0.8% annually to 0.5% annually with the ability to deduct fees from most investment accounts held at recommended custodians.
- Focus on minimizing trading fees and expense ratios to keep your costs low.

[LEARN MORE \(/ABOUT\)](#)

Talk To Us

Name *

First Name

Last Name

Email Address *

How Can We Help? *

[SUBMIT](#)

Purtill Financial announces the opening of new, larger office. ([/s/new-office-press-release-6-16-14.pdf](#))

Purtill Financial participates in MD Preferred Service Network ([/s/napfa_release.pdf](#))

Contact

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22 Alpha Park, Highland Heights, OH 44143

Purtill Financial LLC is registered with the United States Securities and Exchange Commission. Purtill Financial LLC is also registered in the states of Ohio and Florida and has notice filed in the state of Texas. Purtill Financial LLC provides fee-only personal financial planning and wealth management to individuals, families and small businesses. The information on this website is limited to the dissemination of general information pertaining to the services of Purtill Financial LLC, and is provided for convenience purposes only. **Purtill Financial LLC** makes no warranty of any kind with regards to use of this website. Purtill Financial LLC will not be held responsible or liable for any loss or damage resulting from its use. This website should not be construed as a solicitation, offer, or recommendation to engage in any type of transaction. Links to third party websites are for general information only. All content contained therein is the sole responsibility of their respective owners.

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