



*Unbiased Fee-Only Personal
Financial Planning Services*

Phone: (414) 390-1492 (tel:+4143901492)

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Email: info@sjafa.com (mailto:info@sjafa.com)



Our Focus



We assist clients in meeting their financial goals by providing sound personal financial advice. As fee-only advisors, we do not earn commissions nor do we receive compensation from any third party. This arrangement eliminates conflicts of interest present with most financial professionals and advisors.

The scope of client engagements range from comprehensive financial plans to specific issue analyses. We offer planning services where we charge by the hour as well as ongoing and continuous management of investment portfolios where fees are determined by the amount of managed assets. We work with a wide spectrum of individuals and families including high net worth and those just getting started.

OUR VISION

Help clients achieve their goals by developing a roadmap to financial security

OUR MISSION

Provide fee-only personal financial planning and asset management services that meets or exceeds the fiduciary standards of our profession and is:

- ▶ Sensitive to clients financial and non-financial goals and objectives
- ▶ Unbiased (we sell advice, not products)
- ▶ Personalized (customized for each of our clients)
- ▶ Comprehensive (looking at all aspects of the personal financial planning)
- ▶ Tax-sensitive, cost sensitive and responsive



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Business Hours:

Monday through Friday:
8:00am to 5:00pm

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