FINANC CONFIDE FOR LI

GET STARTE

FINANCIAL CONFIDENCE FOR LIFE

GET STARTED

Secure your financial future

Hello and welcome, I'm Rachel. Here at Sloan A
we focus on helping clients make smarter de
financial lives. Our clients include individuals
years of retirement, currently retired indivi
widowers, and young professionals. I've dedic
decades of my life to the world of finance. I si
and advising clients on how to reach their
goals.

Weaving together the financial pieces of your life t
strong foundation and a meaningful financial plan is
of what we do. Our plans are tailored to guide you
your financial future and to inspire you to move

LEARN MORE

Move Forward with Confiden

You don’t need to become a master investor understanding the intricacies of the invest
you can if you’d like), but you do need to be empowered by your own financial plan. Us
financial planning experience, we know how to use modern financial planning strategi
of wisdom to guide clients on moving forward with confidence. Learn more about how w
schedule time to have a real conversation with us about you and your situation.

HOW WE HELP

DIRECTION

What is your goal? And how are you going to get there? For years we have used our trademarked Journey Through Retirement® and Journey Through Widowhood™ to help clients define, build and secure their financial futures.

GUIDANCE

Every meaningful client relationship starts with a great conversation. We use a collaborative style to open new doors of possibility and educate clients. Our goal is to build lifelong partnerships, guiding you through life changes and challenges.

CONF

With so muc
there, how do
it all? With
decades of ex
what works. W
advice matte
clients to co
control of th

CONFIDENCE

With so much information out there, how do you make sense of it all? With more than two de
we know what works. We also know when advice matters most in guiding clients to confiden
their financial life.

EXPERIENCE

Sloan Advisory Group, Inc. is a financial planning and investment practice powered by yea
advanced technology, and fully supported by strategic partners to deliver real value t

EXPERIENCE

Sloan Advisory Group, Inc. is a financial planning and investment practice powered by years of experience, advanced technology, and fully supported by strategic partners to deliver real value to real clients.

WISDOM

Our business is built on the belief that with the right tools, information and advice, we are all capable of securing our financial future. Having a trusted advisor can make all the difference. Wisdom is knowing we don’t need to do this alone.

AUTH

Fiercely
adventurers, sl
compassiona
world, we se
and meaning
real advice fro
real s

When Advice Matters Most

Wealth and success are a state of mind and it’s important to know how you define ther
define success and wealth in ways that are real helps drive the financial plan and fu
Providing advice and guidance through life changes and challenges is one of the esse
to long-term collaborations with clients. Ready to talk?

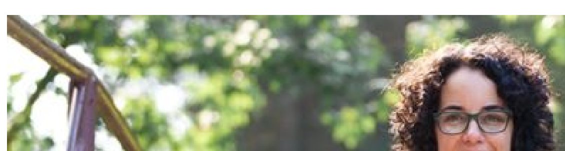
LET’S CONNECT

Don’t be overuled by your fea
If not now, when?

As seen on my first solo motorcycle trip

READ THE FULL STORY

New on the Blog



10.30.18

Facing Your Financial Fears and Cutting Them Down to Size

09.27.18

How Mindfulnes Art of Loving C Makes Good Mo

06.06.18

Women We Admire: Viola Davis – A Hero's Journey

05.08.18

Bill of Rights fo Investors: Empow and Your M

READ MORE

Ready to
plannin
success?
get star

Ready to start planning for success? Let’s get start

Let’s Talk

If you’re approaching retirement, lost the love of you high earning young professional looking to underst your money is going or just coupling for the first tin a lot to talk about on how to move forward with co

Schedule your free 30 minute introductory call

MAKE AN APPOINTMENT

NOTES FROM RACHEL

Get connected and receive Rachel’s advice and guidance delivered directly

FIRST NAME LAST NAME EMAIL

12 E WASHINGTON STREET

GLENS FALLS

NY 12801

(888) 978-8880

SEARCH

To search, type and hit enter

RE

STRATE

APP