

Safir Wealth Advisors, LLC provides a holistic and multidisciplinary approach to wealth management, advising you and your family on a wide range of investing and financial planning needs. We plan for your long term financial health, crafting a comprehensive strategy that aligns your wealth with your family's financial goals and aspirations.

Who We Are

Seacoast area. We primarily serve high-net-worth individuals and affluent families, managing a wide range of their investing and financial planning needs.

Our fiduciary status and independent structure allow us to provide you with objective, professional advice. In order to offer our clients the highest quality of investment services and custodianship of client assets, we partner with Fidelity Clearing & Custody Solutions (a division of Fidelity Investments®). Founded in 1946 and headquartered in Boston, Massachusetts, Fidelity Investments® is a premier mutual fund and financial services group with **\$7.4 trillion** in total customer assets. Our business is further supported by a best-in-class financial technology infrastructure designed to help you get the most out of our advisory relationship.

Our professional resources are matched by a mind-set that constantly strives for excellence. We value hard work, integrity, and responsiveness, capitalizing on our strengths to generate positive outcomes for the families we serve. Our commitment to advanced industry certifications and continuing education ensures that we are equipped to provide you with the best advice.

Founded in 2017, Safir Wealth Advisors, LLC is the latest evolution in our family's lifelong professional pursuit to help families make sound financial decisions and invest in their futures.

Philosophy

As your wealth advisor, our primary role is to guide you through all the financial decisions in life and to instill confidence in your family's financial security. We plan for your long term financial health, crafting a comprehensive strategy that aligns your wealth with your family's financial goals and aspirations. To accomplish this, we leverage our experience and industry expertise, our fluency with advanced technology, and our commitment to cultivating strong and lasting client relationships.

We believe financial planning is an ongoing conversation, an exploration of the possibilities your

Doing so, we will be able to anticipate your financial needs and those of your future generations.

Functioning as your family's CFO, we will provide the level of customized service and attention that you need to stay informed and on track. We will engage directly with your CPAs, attorneys, and other advisors as a team to efficiently manage the planning and investment management process. In allowing us to take on these responsibilities, you can enjoy more peace of mind and reclaim your valuable time.

We have structured our business as a fee-only practice, billing our clients a percentage of assets under management. We believe that this compensation model is the most transparent and objective available, minimizing conflicts and reinforcing our status as a fiduciary.

Biographies



EDWIN T. SAFIR

Principal, Private Wealth Advisor

ted@safiradvisors.com

Ted primarily focuses on the firm's investment advisory practice, utilizing an investment and portfolio construction process grounded in investment research, security selection, and asset allocation. The result is individual portfolios tailored specifically to each client's goals, risk tolerance, and time horizon. Ted leverages his 47 years of industry experience to best position clients to succeed in today's markets.

and Branch Manager at Legg Mason Wood Walker and Branch Manager and Corporate Syndicate Manager with Fahnstock & Co. in New York City.

Ted lives in Greenland, NH and is a graduate of the University of New Hampshire.





Andrew works closely with clients on their most important financial planning goals, helping create a customized approach to managing their wealth. This role incorporates the relevant aspects of investment management, risk management, education planning, retirement planning, tax planning, charitable planning, and estate planning.

Andrew co-founded Safir Wealth Advisors in January 2017, having spent the 3 years prior with Safir Investments. He is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional, and holds the Certified Investment Management Analyst® (CIMA®) and Certified Private Wealth Advisor® (CPWA®) designations. These advanced industry certifications demonstrate Andrew's extensive experience and education in the field of wealth management, as well as his commitment to professional development and upholding rigorous standards of ethics. He is also an active member of the Investments & Wealth Institute™ and the Boston Estate Planning Council (BEPC).

Andrew lives in Boston's Back Bay. He is a graduate of Phillips Exeter Academy and Harvard College.

Expertise



We are committed to providing you with the highest quality of advice. We make it our responsibility to keep current with changes in the industry through continuing education and voluntary, advanced certifications. Andrew M. Safir has earned the following certifications, which are among the most demanding and respected credentials in our industry.

CFP®

CIMA®

CPWA®





The CERTIFIED FINANCIAL PLANNER™ (CFP®) designation is a professional certification mark for financial planners conferred by the Certified Financial Planner Board of Standards (CFP Board). The CFP® is considered the premier designation for financial planners and establishes a baseline of competency for practitioners. From examining a client's current situation, to setting goals, to deciding how to measure progress, a CFP® professional is uniquely qualified to take clients through the financial planning process. A CERTIFIED FINANCIAL PLANNER™ is a professional who has met the requirements set by the CFP® Board of Standards in education, examination, experience, and ethics. In addition to meeting all of the preliminary requirements, designation holders must also meet requirements for continuing education. Visit [CFP Board](#) for more information.

Guidance

We help our clients manage and be financially prepared for key life events. These may include:



Financial preparation for a marriage or divorce



Planning for the birth or adoption of a child

Funding for education expenses



Facing a financial crisis such as an illness, layoff or natural disaster



Buying, selling or passing on a family business



Making sure your money will last during retirement or rolling over a retirement plan



Caring for aging parents or a family member with special needs



Coping financially with the death of a spouse or close family member



Handling inheritance or other unexpected financial windfall

Source: Financial Planning Association.

Compensation

We are fee-only advisors - the only compensation we receive comes directly from our clients. We believe that this model is the most transparent and objective available, minimizing conflicts and reinforcing our status as a fiduciary.

At the beginning of each month we bill an advisory fee based on the average daily balance of portfolio assets under management during the prior month. Our tiered fee schedule is as follows:

Assets Under Management (\$)

Up to \$2,500,000

Next \$2,500,000 (up to \$5,000,000)

Next \$5,000,000 (up to \$10,000,000)

Over \$10,000,000

Annual Rate (%)

1.00%

0.80%

REVIEW YOUR CURRENT FINANCIAL SITUATION

Contact

If you are interested in learning how we might serve your family's financial needs, please reach out to us to start the conversation. We welcome the opportunity to earn your trust.

NAME

EMAIL

PHONE

MESSAGE



63 Niblick Lane
Greenland, NH 03840



(603) 430-6001



(603) 430-6007



info@safiradvisors.com

Client Login



Fidelity Login

SAFIR | WEALTH
ADVISORS
CLIENT WEALTH PORTAL

Client Wealth Portal Login

Our Client Wealth Portal, powered by eMoney Advisor, allows you to view your consolidated financial picture and interact with our planning tools.

Safir Wealth Advisors, LLC is a Registered Investment Advisor

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Investments & Wealth Institute™ is the owner of the certification marks CIMA®, Certified Investment Management Analyst®, CPWA®, and Certified Private Wealth Advisor®. Use of CIMA, Certified Investment Management Analyst, CPWA, and Certified Private Wealth Advisor signifies that the user has successfully completed The Institute's initial and ongoing credentialing requirements for certification.

Disclosures

Powered by Twenty Over Ten