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Gregory L. Schaffer
Companies

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Products & Services



[Investment Advisory \(/products-services/investment-advisory\)](/products-services/investment-advisory)

Schaffer & Company Asset Management, Inc. is a SEC Registered Investment Advisor



Financial Planning

Schaffer & Company offers a comprehensive array of strategic financial planning services backed by the unique investor approach of Schaffer & Company Asset Management, Inc.



[Retirement Planning \(/products-services/retirement-planning\)](/products-services/retirement-planning)

Retirement planning today has taken on many new dimensions that never had to be considered by earlier generations. For one, people are living longer.



[Asset Allocation Planning \(/products-services/asset-allocation-planning\)](/products-services/asset-allocation-planning)

Asset allocation is the process of selecting a mix of asset classes that closely matches an investor's financial profile in terms of their investment preferences and tolerance for risk. It is based on the premise that the different **asset** classes have varying cycles of performance



[Insurances \(/products-services/insurances\)](/products-services/insurances)

At The Gregory L. Schaffer Insurance Agency, Inc. we have numerous relationships with many carriers offering All Forms Of Insurance and instead of you going to 4-5 separate insurance shopping for you.



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Real Estate Services (/products-services/real-estate-services)

Trust the sale of your largest investment to a firm that is not just a REALTOR but a trusted financial professional skilled in all areas of finance, one that you can count on to serve in your best interest.



Taxation & Accounting

Year 'round professional Income tax preparation for Individual, Partnership, Limited Liability Companies, Corporations, Trust, Estates and Gift Tax Returns, Consulting Services



Trust Services (/products-services/trust-services)

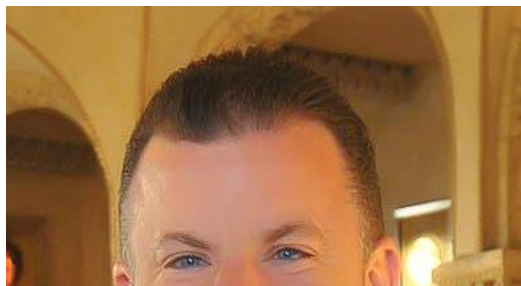
Our goal is to partner with families to preserve, grow, and manage wealth.



Executor Services (/products-services/executor-services)

At Schaffer Wealth Preservation & Capital Management, we are experts in the services we provide, this is critical as assets of estates go unattended many times which may lead to financial harm to the estate and beneficiaries.

Our Team



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(<https://www.facebook.com/gregory.schaffer/>)

(<https://www.linkedin.com/in/gregoryschaffercompa>

 ([skype:](#))

(<https://twitter.com/SchafferCo/>)

Gregory L. Schaffer (/team-member-01/gregory-l-schaffer)

CEO, CIO, President

Chief Investment Officer

Certified Financial Planner-CFP®

Registered Financial Consultant-RFC®



(/team-member-01/kelly-r-schaffer)



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=

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(<https://www.linkedin.com/in/kelly-schaffer-69b22a42/>)ⁱⁿ

 (skype:)

Kelly R. Schaffer (/team-member-01/kelly-r-schaffer)

Vice-President of The Gregory L. Schaffer Insurance Agency
NYS Licensed Property & Casualty Broker & Agent
NYS Licensed Life, Accident & Health Agent
Professional Trustee
Notary Public



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 (skype:)

David M. Cocuzzi (/team-member-01/david-m-cocuzzi)

Accountant
Chief Compliance Officer



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Nicole D. Swinarski [\(/team-member-01/nicole-d-swinarski\)](#)

Executive Assistant
NYS Licensed Real Estate Salesperson



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(skype:)

Theresa E. Furness (/team-member-01/theresa-e-furness)

NYS Licensed Property & Casualty Broker & Agent
NYS Licensed Life, Accident and Health Agent

Commentary worth reading

Make 529 plan contributions before the year end! (/blog-01/make-529-plan-contributions-year-end)

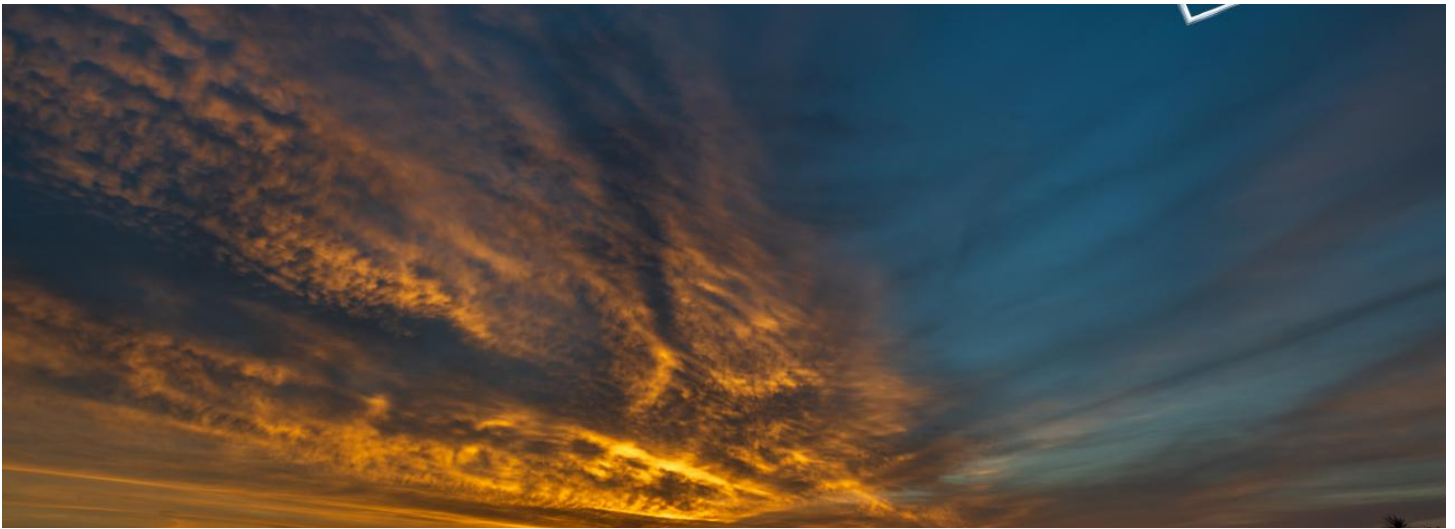
by **Gregory Schaffer** on **Dec 7, 2018**

If you're a new York State taxpayer and a 529 plan account owner, you may be able to deduct up to \$5,000

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Want to lower potential risk, try Dollar Cost Averaging! (/blog-01/want-lower-potential-risk-try-dollar-cost-averaging)

by **Gregory Schaffer** on **Dec 6, 2018**

Dollar-cost averaging (DCA) is an investment technique which involves buying a fixed dollar amount of a





Social Security adds COLA of 2.8% next year ! (/blog-01/social-security-adds-cola-28-next-year)

by **Gregory Schaffer** on **Oct 11, 2018**

The Social Security Administration announced today that 63 million beneficiaries, including retirees



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[Saving for College \(/blog-01/saving-college\)](#)

by **Gregory Schaffer** on **Sep 26, 2018**

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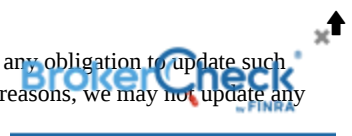
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