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You can do a lot in a lifetime.

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Marathon Mission Wealth Management

We are a fee-only Registered Investment Advisory (RIA) firm. Fee-only means that we charge a fee for our investment advice. We are not salespeople and do not sell any products to our clients. We do not collect commissions in any shape or form. Investment management and financial planning is offered solely by Michael Ryan, a Certified Financial Planner professional. We work with our clients on a fiduciary basis, which means we have a legal responsibility to act in our client's best interest in everything we do. We are held to a higher standard. A legal standard. We feel this is a moral obligation that we willingly accept. As an RIA, we are regulated by the Securities and Exchange Commission (SEC). Under the Investment Advisers Act of 1940, Section 206, we are considered fiduciaries. Marathon Mission Wealth Management always makes decisions and recommendations from the viewpoint of what we would do, considering the knowledge we have, if we were the client. To learn more about the CFP fiduciary standard click here (http://www.cfp.net/public-policy/public-policy-issues/fiduciary-standard). For more information about the SEC and their fiduciary rule click here (https://www.sec.gov/divisions/investment/advoverview.htm).

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Our Services

Portfolio Management

Ongoing portfolio management based on the individual goals, objectives, time horizon, and risk tolerance of each client...

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Pension Consulting Services

Consulting services to pension or other employee benefit plans (including but not limited to 401(k) plans)...

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Investment, retirement, college, and estate planning, tax concerns, life insurance, employee benefit planning and more...

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Latest Posts

26	2019 Changes in the STAR	
	Property Tax Credit	

detail/2019-changes-in-the-starproperty-tax-credit)

If you own a primary residence in New York State and you make less than \$500,000 per year, you need to be aware of the 2019 changes in the STAR property tax credit. If you make more than \$500,000, you do not qualify for STAR and therefore do not need to take any action. For everyone else, you may or may not need to do something. As with everything government, this is more complicated than it needs to be.

2018 Tax cuts and Withholdings 05

(https://marathonmissionwealth.com/sitlet/apstic/lenarathonwealthonw detail/2018-tax-cuts-and-withholdings) detail/

> If you are employed, you probably noticed that your net paycheck went up recently due to changes in the budget t IRS tax withholdings tables. This is the result of the 2018 tax cuts that went into effect in January. A lot has changed under the new rules.

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Contact Us

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Links

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