Mark J. Snyder Financial Services Inc.

Trusted Fiduciary Advisors Providing Local Personalized Service

Managing over 250 Million Dollars while helping clients enjoy their lifestyle on Long Island for almost half a century

What Makes Our Firm Different?

In an industry where it seems that every financial service provider carries the moniker of "financial planner" or "fiduciary", the ability to articulate a differentiation is extremely challenging for the service provider and, even more so, for the potential client, who is placing, to a significant degree, their financial future in the hands of a financial professional.

Transparancy

People should understand how much they pay and what they are paying for.

We're Local

Working together face to face creates an extra layer of accountability and a sense of family.

Equality

A person's value is not measured by their net worth.

Truth

People should always expect (and get) the whole truth.

We Are Your Local Trusted Advisor

What is a trusted advisor? When it comes to managing your financial future would you prefer to work with someone bound by trust and the highest legal standards of professional care and accountability or someone that is not?

Watch the Video

Retirement Planning

We are here to help you successfully transition from paycheck to portfolio income when you retire. Using sophisticated models, we help each client answer the question, “How much can I take out of my portfolio so I do not overspend my resources or underspend the quality of my retirement years?”

Investment Advisory

Our dedicated Investment Management Team brings the best thinking of our firm to each client’s individual account. The result is an investment strategy that is built to last. We build custom global investment strategies designed to meet your specific cash flow needs.

Estate Planning

Our goal is to make the estate and wealth transfer planning process clear and understandable. We ask the key questions to help our families think through the various complexities of transferring wealth

Wealth Preservation

Wealth preservation strategies have failed historically by either not taking enough risk or taking too much risk in one area. The solution is to balance the risks taken for better outcomes in a full range of market environments.

Planning to Save for College or Just Graduated?

It’s never too late to start saving for your child’s college education. It all begins with a well thought out plan and choosing the right solution to help achieve that goal. Let us walk you through each stage of the savings process including post graduation retirement planning tips.

College Planning - The Basics

Do you have a plan to save for your child's college education? Setting goals as early as possible is key to success!

Understanding 529 Plans

A 529 college-savings plan is a flexible and tax-advantaged way to save for qualified higher-education expenses.

Expected Family Contribution

It can be advantageous to know one’s EFC before beginning the college-application process

Latest Financial Services Blog Posts

Financial Planning articles to offer advice and help on many different topics.

Retirement Planning Strategies for Young Investors

Keep in mind that how you handle your money today may affect how you live tomorrow. Also note that it's a common mistake to think that one needs a lot of money in order to invest and/or save for

5 Components of a Successful Retirement Plan

Retirement planning does not need to be complicated or overwhelming. In fact, in many ways it can be surprisingly simple, even fun at times as you‘ll see here. While individual situations vary, the

Retiring on Long Island; Should I Stay or Should I Go?

Long Island has a lot to offer but it's also a relatively expensive place to live, especially for retirees. While other locations may be desirable retirement destinations once you've adjusted to

No Workplace Retirement Plan? Now What?

If you haven't done much retirement planning or saving there are several steps you can take to get your planning on track. At our office we regularly meet with clients, creating financial plans to

Get in Touch with Us Today!

ABOUT US

Our mission is to serve the personal financial planning and investment management needs of those preparing for retirement, and the large population of retired individuals who have come to depend on us.

LATEST BLOG POSTS

Retirement Planning Strategies for Young Investors

5 Components of a Successful Retirement Plan

Retiring on Long Island; Should I Stay or Should I Go?

No Workplace Retirement Plan? Now What?

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