

A photograph of a man and a woman smiling and embracing each other outdoors. The man is wearing a grey scarf and a dark jacket, and the woman is wearing an orange scarf and a dark jacket. The background shows trees with autumn foliage.

# Plan on it.

Assisting our clients in every aspect of their financial lives.

Learn about our services 

FINRA's BrokerCheck (<http://brokercheck.finra.org/>)

## Who We Are

Our purpose is to serve and deliver *plus one*.

Since 1995, Sutterfield Financial Group, Inc. has provided comprehensive investment services that help clients achieve their financial goals.

Our mission is to assist our clients in every aspect of their financial lives. We strive to provide the financial services to individuals, families, and businesses. Additionally, we serve as a professional magnet for advisors looking to create more sustainable, client-centric businesses. Our comprehensive financial planning and investment advisory firm has a wide-range of experience in all of the key financial practices.

Learn more about us (</about-us/>)



# Our people are our biggest asset

## Meet Shelly

"Shelly operates like a well-oiled machine! Her efficiency and sense of urgency is contagious."

Meet the rest of team Sutterfield → (</team>)

## What We Do



Investment Planning

(</services/#section-1>)



## Insurance Planning

(/services/#section-2)



## Retirement Planning

(/services/#section-3)



[\(/services/#section-6\)](/services/#section-6)



Lending

[\(/services/#section-5\)](/services/#section-5)



Tax & Accounting

[\(/services/#section-4\)](/services/#section-4)

Learn more about our services → [\(/services/\)](/services/)



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2017 Advisor Symposium

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Client Appreciation Day!

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## Disclosure

Securities offered through Purshe Kaplan Sterling Investments, Member FINRA (<http://www.finra.org/>)/ SIPC (<http://sipc.com/>). Headquartered at 18 Corporate Woods Boulevard, Albany, New York, 12211. Investment Advisory Services are offered through Sutterfield Financial Group, Inc., an SEC Registered Investment Advisor. Purshe Kaplan Sterling Investments and Sutterfield Financial Group, Inc. are not affiliated companies.

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