WELCOME TO SAGE FINANCIAL GROUP

Built on Values. Delivering Results.

(https://www.sagefinancial.com/)

(/disclosures/#accolades)
Top Financial Advisors

(/disclosures/#accolades)
Top 300 Registered Investment Advisers

98% Client Retention

(/disclosures/#accolades)
50 Top Registered Investment Advisers

(/disclosures/#accolades)
Best Places to Work

For more information on these accolades, click here (/disclosures/#accolades).

98% client retention. 100% committed to exceeding expectations.

In 1989 David, Alan, and Stephen Cohn broke with convention and founded Sage Financial Group as an independent registered investment adviser.[1] (/disclosures/#notes)

SAGE FINANCIAL GROUP (https://www.sagefinancial.com/)

Their goal was to provide individual investors with advice they could trust. Unlike most large banks and brokerage firms, Sage does not receive any commissions, and our recommendations are not mandated by a parent company. Our advice is fee only, focused on what is in each client's best interest.

In 1994, the Cohns took a similarly bold step and founded Sage Online. Leveraging the new powers of the internet, they democratized investing when they created the largest online forum devoted to mutual funds and became the anchor tenant of AOL's finance channel.

Today, our aim is still to anticipate our clients' needs and provide them with highly personalized professional service.

So we are building out a suite of integrated wealth services focused on managing, coordinating, and integrating the most important areas of our clients' financial lives: investment strategy, financial planning, trusts and estates, tax services, cash flow management, surviving spouse support, and insurance planning.

The result is a unique experience that empowers our clients to spend more time on what matters most — family, financial stability, well-being, and leaving a legacy.

Our clients gain:

- Time
- Efficiency
- Simplification
- Coordination
- Cost Savings
- Peace of mind

We are still compensated for our advice and services on a fee only basis. We do not sell products, nor receive a commission or compensation from third parties.

It's personal.

The approach we take for each client is highly personal, because no two clients have the same goals or circumstances.

It is also rigorous and thorough.

- Our team of experienced professionals can advise clients in exactly the way each one needs to be advised.
- We are able to finish the [illegible] in house, saving our clients time and money.

- Our focused expertise and regular communications provide our clients with original insight that keeps them well-informed and prepared to succeed.

Sign up for the Sage Investment Perspective:

FIRST NAME

LAST NAME

EMAIL

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