Helping you chart your course

and keeping you pointed in the right direction

About Us

Compass Financial Group is an independent wealth management, financial planning, and investment advisory firm located in Deerfield Beach, FL. Compass was founded in 1961 and specializes in integrated financial advice for our high net worth clients.

Our Process

Our process begins with an introductory meeting that allows us to develop an understanding of your personal and financial situation. We also share with you some information about our firm and our services so we can collectively determine if

Our Investment Philosophy

We work closely with our clients to develop a customized Investment Policy Statement that is tailored to meet their goals and objectives.

Read more

Compass is the right fit for you.

Read more

Read more

Our Services

At Compass Financial Group, we believe that having a coordinated strategy to managing your wealth can provide the framework for achieving financial security. Our wealth management approach may incorporate portfolio management, retirement planning, tax strategies, and a number of other services that can provide both balance and direction for your overall objectives. Read more

Portfolio Management and Investment Consulting

Compass is dedicated to the total economic wealth of investors. We use a flexible, but disciplined approach using

Wealth Transfer & Estate Planning

A properly designed estate plan is an integral part of ensuring that your assets are protected and handled in a manner that is consistent with your desires. While most

Retirement Planning

Being able to retire comfortably is one of the most common goals shared by individuals today, yet many find it difficult to assess their retirement preparedness. Increasing life

institutional quality research to work toward achieving maximum returns consistent with your tolerance for risk.

people understand that an estate plan can enable you to pass your assets to your heirs in the way you choose, there are many other reasons to address this important aspect of your financial preparation.

expectancies coupled with rising medical costs and other future uncertainties are very real concerns that individuals and families must address.

Tax Minimization

While we do not prepare tax returns, there are still many ways to help reduce current and future income tax liability. We can provide some of those sophisticated tax minimizing options and ideas when appropriate and can work with your accountant or other tax professionals when implementing.

Risk Management & Asset Protection

As a firm, we have a strong focus on helping our clients stay wealthy. One of the ways that we do this is by managing the risks of unexpected events. While some of our risk management techniques are implemented in our investment approach, we also want to make sure that you are sufficiently protected against risks outside of your investment portfolio.

Family Office Services

We offer family office consulting services in which we can oversee various investment accounts and financial issues on behalf of the client. Our family office services also extend beyond the traditional financial services in our attempt to engage and meet the specific needs and objectives of our clients.

Our Principals

Blair C. Shein

Blair C. Shein is a Chartered Financial Analyst® (CFA®) and CERTIFIED FINANCIAL PLANNER™ (CFP®) professional and is the Vice President of Compass Financial Group.

Jay L. Shein

Jay L. Shein is a CERTIFIED FINANCIAL PLANNER™ professional, a Certified Investment Management Analyst®, a Certified Investment Strategist℠, and is the Chief Investment Officer and Strategist of the Compass Financial Group.

We manage wealth for individuals and families, providing investment management, financial planning, and family office services.

Contact Us

News and Publications

Concentrated Stock Strategy Paper

Jay Shein was published by CCH in the March 2019 edition of Estate Planning Review- The Journal. The paper was titled "Concentrated Stock Strategy."

Forbes ranking of Best-In-State Wealth Advisors

In February 2019, Blair Shein was named to the Forbes 2019 ranking of Best-In-State Wealth Advisors.

ESG Investing Paper

Blair Shein was published by CCH in the January 2019 edition of Estate Planning Review- The Journal. The paper was titled "Environmental, Social & Governance (ESG) Investing: Making

an Impact with Your Investments."

See more News and Publications

Third-party rankings and recognition from rating services or publications are no guarantee of future investment success. Working with a highly-rated adviser does not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the adviser by any client, nor are they representative of any one client's evaluation. Neither the firm nor any adviser paid a fee for the award.

Information about the criteria used in making these rankings is available by clicking here.

Office

665 SE 10th Street, Suite 202
Deerfield Beach, FL 33441

(954) 481-2607

Map | Directions

Get in Touch

Your name

Your email address

Subject

Message

Send

Disclosures | Contact