Richard Young Associates

Helping Families Since 1974

When you ask our clients about wealth, you'll hear them talk about wealth being a tool, empowering their family to live the life they want to live. It's not the goal - it's the freedom to pursue their personal goals.

This is why we are so intent on the work that we do. We help our clients make the best decisions they can to utilize and grow that wealth, enabling them to live the lives they want for their families. We partner with our clients to provide ongoing advice to guide them through many of life's decisions, and we help them invest in a manner that is tailored to their specific needs.

Local Experts

We're a local firm through and through, but we've been around the block. In fact, we manage **over $350 million** for clients all across the nation. Your family gets the warmth and attention you expect from a local firm with the experience of a larger one.

Rooted in Research

Many advisors try to game the market and predict the winners, but we've seen the results. Instead, we structure our investing after **Nobel Prize-winning research**, letting the data guide our methodology and planning for long-term success.

Teachers at Heart

We don't want to simply be an advice dispenser. Instead, we try to help our clients **truly understand** the reasons for the advice we're giving and then empower them to make the best decisions going forward. We don't tell, we teach.

Simple Fees

We are a fee-only firm – we get no commissions from the investments of our clients – meaning our **interests are aligned** with yours. We're fiduciaries and have every reason to help you make the best decisions possible for you, because when you do better, we do better.

Ready to Learn More?

SPEAK WITH AN ADVISOR

02:37

Advice from Our Pros

Money$MD PODCAST

Retirement Calculator

Our Advisors

Steve Marbert, CFP®
John Travis, MBA
Josh Marbert, CPA
Matthew Travis
Ryan Borders

Our advisors aren't isolated – when you work with one, you're working with the collective wisdom of the team. This structure helps every advisor provide the best advice, letting you benefit from a whole host of professional experiences. And if you're a Dave Ramsey fan? We have SmartVestor Pros on the team too. Click here for more about our advisors.

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Office Hours: Monday - Friday 8:30 a.m. - 5:00 p.m.

Check the background of this firm on FINRA's BrokerCheck

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