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Stephan and Associates WEALTH MANAGEMENT (index.php)

YOUR TRUSTED FINANCIAL & INVESTMENT ADVISORS

WEALTH MANAGEMENT IS WHAT WE DO BEST, YOU'RE BUSY ENOUGH WITH THE REST

EXPERIENCE WEALTH MANAGEMENT THAT PUTS YOUR NEEDS FIRST

When it comes to your personal wealth, you have your own unique goals and plans. When you seek financial help, you want someone who takes the time to understand those goals and establish strategies to help you achieve them.

Stephan & Associates works with people of all ages and income levels to provide personalized wealth management strategies. Led by our founder, Brian Stephan, CFP®, our team is dedicated to using their experience in the financial field to help Xenia residents manage their finances. Whether you are a first-time investor, a new retiree, or simply looking to rollover your 401(k) from your last job, we're here to help!

Find out if we're the right fit for you – schedule a complimentary initial consultation today!

WEALTH MANAGEMENT SERVICES WE PROVIDE

As a fiduciary wealth management firm, our services are designed to fit the needs of our client. We don't believe in a one-size-fits-all approach to wealth management. Instead, we tailor our strategies to you.

We provide a wide variety of services and assistance to help meet the needs of our clients. This includes, but is not limited to:

- Retirement planning
- Investment services
- Education planning
- Estate planning
- Life insurance
- Non-profit finance management

A CLIENT-FOCUSED APPROACH TO WEALTH MANAGEMENT

At Stephan & Associates, we feel that everyone deserves experienced financial advice, no matter which tax bracket they fit into. We welcome clients of all income levels and investment experience. We work with clients who need estate planning for their wealth, and first-time investors working toward personal goals like retirement, travel, or home ownership. We encourage potential clients to reach out to our advisors and ask us anything they'd like to know; to us, there's no such thing as a trivial question!

We believe in taking the time to not only understand your finances, but to get to know you on a personal level. We know that your financial goals are inextricably tied to the people and passions in your everyday life – that's why we make an effort to understand what matters to you and build your strategies around it.

One-on-one interaction is an important aspect of our firm. We are always available to answer your questions, even if we're out of the office, and will work to accommodate your needs and schedule.

OUR PASSION IS YOUR FINANCIAL GROWTH

When you put your trust in us, we want to make sure you feel that you and your finances are in good hands. No matter what your goals are, we do all we can to help you make financial decisions that make sense to you.

Find out what we can do to help you actively work toward financial improvement. Schedule your complimentary consultation today!

WHAT TYPES OF FINANCIAL SERVICES DO YOU OFFER?

DO YOU OFFER 401K SERVICES?

WHAT TYPE OF FINANCIAL PLAN WILL WORK FOR ME?

SETTLE FOR MORE

WE ARE NOT IN THE BUSINESS TO SELL ANY PARTICULAR PRODUCTS,
RATHER WE ARE HERE TO PROVIDE ADVICE, GUIDANCE AND

RATHER WE ARE HERE TO PROVIDE ADVICE, GUIDANCE AND RECOMMENDATIONS EXCLUSIVELY BASED ON YOUR OWN PERSONAL FINANCIAL PICTURE.

EVALUATE

WHILE OTHER FINANCIAL FIRMS DESCRIBE THEIR INTERNAL STRUCTURE, SERVICE OFFERINGS AND CAPABILITIES AS A MEANS TO GENERATE SALES, STEPHAN & ASSOCIATES UNDERSTANDS THAT WE ARE A SERVICE FIRM, NOT A SALES FIRM.

ANALYZE

WE DO NOT REQUIRE A MINIMUM ASSET LEVEL OR NET WORTH TO SERVE CLIENTS. IN FACT, WE LOVE THE IDEA OF GUIDING THOSE WHO ARE JUST STARTING THEIR INVESTMENT JOURNEY.

ROADMAP

WE ARE HERE TO BE YOUR COMPASS, TO GUIDE YOU THROUGH THE EVER-CHANGING TIDES OF THE INVESTMENT INDUSTRY. NO MATTER HOW THE TIDES CHANGE, ONE THING REMAINS FIRMLY FIXED: OUR COMMITMENT IS TO YOU.

PLAN FOR A BETTER FUTURE

Legacy planning is a special subset of financial planning. That's because leaving a legacy entails much more than leaving an inheritance or charitable gift. Leaving a legacy means passing along celebrated traditions and cherished values to those we love. Securities offered through American Wealth Management. Member FINRA/SIPC. HQ: Atlanta, GA 800-633-4613. Advisory services offered through Great Lakes & Atlantic Wealth Management and Advisory Partners, LLC, a registered investment adviser.

RETIREMENT PLANNING

We are here to walk with you through every life stage you encounter from career transitions and marriage to children heading off to college, having grandchildren and on into and through retirement.

INVESTMENT SERVICES

Our approach to overseeing our clients' investment portfolios has been based on personalized account planning, risk minimization, disciplined professional money management, and tax efficiency.

FINANCIAL GUIDANCE

Life is full of competing priorities – some you plan for and some you don't. You probably have an idea of the things you want to do that will require money

ESTATE PLANNING STRATEGIES

To plan your legacy, you'll need long-term vision, careful planning and meticulous follow-through.

LOAN NUMBERS YOU HATE? LET US CALCULATE!

Loan Amount:

Rate (APR):

Term:

Format: 12m, 36m, 3y, 7y

Please fill in all fields.

LEVEL UP YOUR FINANCES TODAY

At Stephan & Associates, we seek to serve clients from all walks of life, helping you plan for your future financial needs.

Call Now! 937-374-2002

CONTACT US

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