Confident Financial Decisions

START HERE

FREE 30 MINUTE CONSULTATION (HTTPS://CALENDLY.COM/HFA-MOCK/30MIN)

Your Financial Planning & Investment Management Solution to Help You Build The Blueprint to Your Future Success

Upswing Advisor is an independent, Fee-Only financial planner to young professionals, families, and entrepreneurs. We are financial-planning focused and go far beyond just traditional investment management. As Fiduciaries our advice is objective and free of any conflicts of interest.

Financial Planning

Investment Management

The Fun Stuff!



Your career, family, and financial goals will be the foundation of your financial plan. It all starts with our Discovery process that focuses on getting to know you - how you think, how you hustle, and how you want to live your life.

Financial planning is dynamic. If your situation changes and you need to call an audible we will be here to help you adjust. This is why your financial plan is a living document that we will review at least once per year.

Time to put away the crystal ball! No one knows where the stock market will go next which is why Upswing Advisor's professionally managed low-cost investment portfolios takes a disciplined approach to investing.

You will get a customized Investment Policy Statement outlining your financial goals, tolerance for risk, time horizon, and investment allocation. This will be your guide to making confident investment decisions from here on out!

Ever wonder if you are maximizing your Credit Card rewards? Can you get paid to shop online? Interested in a side hustle to earn extra cash?

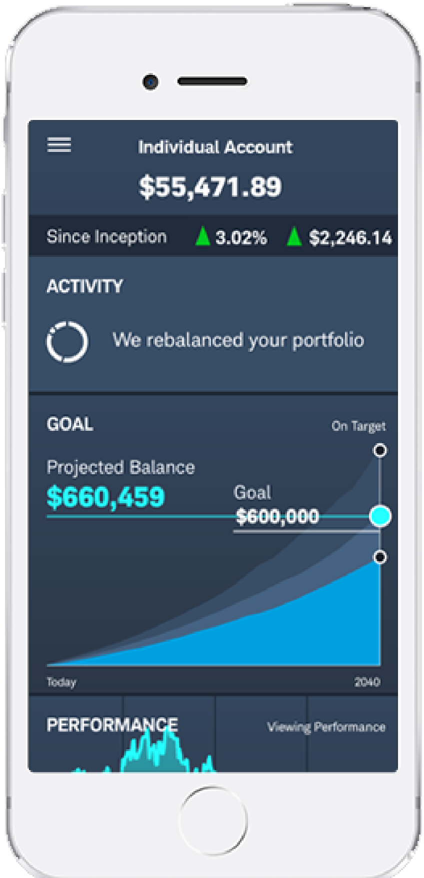
We love finding new ways to help you earn and save more money. As part of your on-going planning we will make sure you are taking the right steps to maximize every opportunity to earn those extra travel rewards, or put some extra cash in your pocket!

Our Services Include:

- Goal Setting
- Cash Flow Planning
- Employee Benefits Maximization
- Debt Management
- Tax Planning
- Retirement Planning
- Buying a Home

- Student Loan Payoff Strategies
- Investment Management & Education
- Life Insurance
- Disability Insurance
- Property & Casualty Insurance
- College Savings Strategies
- Travel Consulting

- Stock Option Planning
- 83(b) Elections
- Career Advice
- Lifestyle Planning
- Credit Card Rewards
- Credit Report Consulting
- Banking Relationship Advice



Schwab Institutional Intelligent Portfolios

Upswing Advisor has chosen to partner with Schwab's Institutional Intelligent Portfolio technology which provides you seamless access to our professionally managed portfolios all from the convenience of a single smart phone, tablet, or web browser. The application will track your performance, account balances, investment holdings, as well as provide you with an up-to-date status report of your progress towards your goals.

A Dedicated Advisor

We love technology here at Upswing, but we believe a true financial planning experience is predicated on Trust. The Trust that your financial planner knows the ins and outs of your personal situation, how you behave when the markets turn south, and most importantly has a complete understanding of your goals. Our priority is you, the client, and your plan which is why we will meet in person at least once per year, with quarterly check-in calls, to make sure you are on track.

What is the Investment and How Do I Get Started?

The majority of your bills are based on a monthly payment schedule - car payments, mortgage, gym membership, rent, and the list goes on. We believe the investment in your financial plan should be no different. Our affordable Financial Planning services can range from $150 to $300 per month depending on the complexity of your situation. Upswing's Investment Management services are 0.80% of Assets Under Management.

We don't require any fees upfront to get started - just our Free 30-minute Consultation (https://calendly.com/hfa-mock/30min) and virtual data collection form. After our call we will put together a proposal outlining exactly what your investment will be and what to expect from the relationship. No hidden fees, no commissions, and no third party compensation.

Are you on track for retirement? Click here to find out!
(http://upswingadvisor.com/upswing-retirement-calculator)

Featured In:

THE WALL STREET JOURNAL

The New York Times

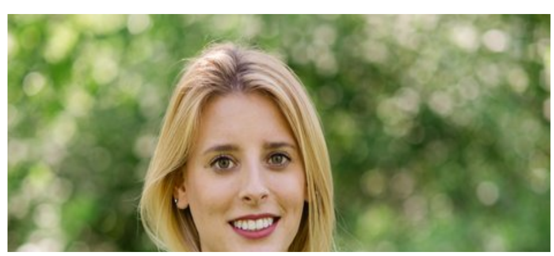
CNBC

Upswing Advisor is powered by HIGHLAND Financial Advisors, LLC leveraging over 45 years of combined financial planning experience.

AnnaMarie Mock, CFP®

Why Financial Planning?

To empower you to make confident financial decisions so you can focus on what matters most to you. It is all about quality over quantity, and if I can solve all of the uncertainties surrounding your financial life – you will be able to be even more focused on living the life you want to live!



This is why we, at HIGHLAND Financial Advisors, LLC, started Upswing Advisor – to provide a platform for young professionals, new families, and young entrepreneurs to have access to comprehensive financial advice.

Professional Background

During my junior year at Montclair State University, I reluctantly attended a career fair held on campus not expecting to find the company I would call home, HIGHLAND Financial Advisors. As a Finance and Management undergrad, I was never really introduced to the financial planning field until my internship with HIGHLAND which was a revelatory experience. From that internship, I knew financial planning was my calling.

After graduation, I began working full-time for HIGHLAND as a Paraplanner and immediately enrolled in the CFP® program at Fairleigh Dickinson University. I passed my CFP® exam in the summer of 2016. Fast forward a couple years, I am currently working as a Financial Planner for Highland and am leading the team at Upswing Advisor.

As a millennial myself, I am passionate about educating other young professionals, so they are armed with an arsenal of knowledge across the investment and financial planning world. I enjoy navigating employer benefits, exploring tangible and aspirational goals, and creating actionable recommendations to help achieve what matters most to you. Success starts with creating a strong foundation with the basics and methodically working through life changing events.

Personal Background

I live in Essex County with my husband, Dorian, who is a mechanical engineer. We love to travel as much as possible domestically and abroad. We enjoy staying active throughout the year and being outdoors as much as possible. We love to hike, camp, and snowboard; watch out for us on the mountain though!

One day in the near future, we are hoping to expand our family with a rescued furry friend.

We Partner With:

CFP™ CERTIFIED FINANCIAL PLANNER™
(http://www.cfp.net/utility/find-a-cfp-professional/Details/?key=9366d949-984b-4f11-9219-470f43619903&SimpleSearch=True&CityStateZip=07457&City=&Zip=07457&Radius=5&AreasOfSpecialization=&Page=1&Session=87077)

XY PLANNING NETWORK
(http://www.xyplanningnetwork.com/advisors/ed-leach-cfp-mba/)

NAPFA THE POWER OF TRUST

Questions? If you would like to speak with us please give our offices a call at 973-557-2933. We look forward to hearing from you!

Send Us An Email

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Subject *

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1680 Route 23 North, Suite 210, Wayne, NJ 07470

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