



**866-569-9272**

Complimentary Consultation  
(<https://www.meritfinancialadvisors.com/complimentary-consultation/>)

Careers  
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Client Portal  
(<https://www.meritfinancialadvisors.com/resources/client-portal/>)

Main Menu

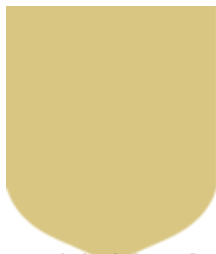
## Welcome to Merit

**Merit is a retirement planning firm that seeks to establish, educate, and satisfy the financial goals of individuals in and approaching retirement.**

We focus on providing reliable and objective financial advice by establishing a genuine and long-lasting relationship with our clients. We administer an array of financial services, which focuses on our client's personal growth along with their financial goals.

We believe that we can help address the retirement challenges in America by bringing financial freedom, wellness and confidence to the working population and retirees. As people experience financial wellness, they will live more productive lives.

Our mission is to create the ultimate client experience. We strive to exceed client expectations by providing the best possible service while helping clients feel confident about establishing and targeting their financial goals.



[\(https://www.meritfinancialadvisors.com/services/wealth-management/\)](https://www.meritfinancialadvisors.com/services/wealth-management/)

For Individuals  
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Merit Financial Advisors is a retirement planning and wealth management firm focused on helping individuals and families pursue their financial goals.

Wealth Management  
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## For Advisors

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Merit assists independent advisors, or those thinking of becoming independent, with strategies through our Registered Investment Advisor Platform.

### Our Platform

(<https://www.meritfinancialadvisors.com/services/independent-advisor-partners/>)



(<https://www.meritfinancialadvisors.com/services/worksite-financial-wellness/>)  
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## For Companies

(<https://www.meritfinancialadvisors.com/services/worksite-financial-wellness/>)

Worksite Financial Wellness is a turn-key financial wellness solution for retirement plan advisors, plan sponsors, plan participants, third-party benefit consultants and corporations.

### Our Solutions

(<https://www.meritfinancialadvisors.com/services/worksite-financial-wellness/>)



(<https://www.meritfinancialadvisors.com/services/private-wealth/>)  
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For Existing Clients  
(<https://www.meritfinancialadvisors.com/services/private-wealth/>)

If you are a current client in our Merit Financial Advisors or Botsford Private Wealth division please click here to log into your client portal.

Client Portal  
(<https://www.meritfinancialadvisors.com/resources/client-portal/>)

Our desire is to partner with you, balancing tactical advice with innovative strategy. We are striving to change the way relationships operate within the financial industry. Accomplishing this by creating long lasting multi-generational partnerships.



## Schedule a Complimentary Consultation

Make an Appointment  
(<https://www.meritfinancialadvisors.com/contact-us/>)

Check the background of your financial professional on FINRA's  
BrokerCheck.



Alpharetta GA  
(<https://www.meritfinancialadvisors.com/about/locations/alpharetta-ga/>)

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Alpharetta, GA 30009

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Fax: 678.867.7060 (<http://tel:+16788677060/>)

Toll-Free: 1.866.637.6949 (<http://tel:+18666376949/>)

## **Atlanta GA**

**(<https://www.meritfinancialadvisors.com/about/locations/atlanta-ga/>)**

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Atlanta, GA 30328-5537

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Fax: 678.867.7060 (<http://tel:+16788677060/>)

Toll-Free: 1.866.637.6949 (<http://tel:+18666376949/>)

## **Birmingham AL**

**(<https://www.meritfinancialadvisors.com/about/locations/birmingham-al/>)**

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Birmingham, Alabama 35243

Phone: 205.969.8011 (<http://tel:+12059698011/>)

Fax: 205.969.8014 (<http://tel:+12059698014/>)

Toll-Free: 1.866.309.9194 (<http://tel:+18003099194/>)

## **Davidson NC**

**(<https://www.meritfinancialadvisors.com/about/locations/davidson-nc/>)**

130 Harbour Place Dr, Suite 250

Davidson, NC 28036

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Fax: 704.892.1388 (<http://tel:+17048921388/>)

Toll-Free: 1.888.890.4500 (<http://tel:+18888904500/>)

## **Frisco TX**

**(<https://www.meritfinancialadvisors.com/about/locations/frisco-tx/>)**

3001 Dallas Pkwy, Suite 100

Frisco, TX 75034

Phone: 214.423.4200 (tel:2144234200)

Fax: 214.423.4211 (tel:2144234211)

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## **Jacksonville FL**

**(<https://www.meritfinancialadvisors.com/about/locations/jacksonville-fl/>)**

8826 Goodby's Executive Dr, Suite B  
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Toll-Free: 1.888.733.1102 (<http://tel:+18887331102/>)

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