SYM FINANCIAL ADVISORS

Indiana - Winona Lake, Fort Wayne, Carmel, South Bend
Michigan - Midland | sym.com | 800-888-7968

SYM Wealth Management

EXECUTIVE BLUEPRINT

BLUEPRINT FOR EXECUTIVE WEALTH PLANNING

Wealth planning is personal and your path is distinct

Your planning needs are different. That's why, when serving corporate executives, effective financial advisors must understand and anticipate your unique challenges and opportunities.

With SYM, you can expect both depth and breadth in an advisory relationship, because SYM specializes in the unique aspects of wealth planning for an executive's financial life, including:

- Equity compensation modeling
- Performance award/bonus savings strategies
- Stock option analysis and recommendation
- Employee stock purchase plans
- Mandated holding requirements
- Tax strategies
- Risk management
- Global asset allocation review
- Diversification strategies
- Executive employee benefits
- Employment transitions

The word SYM means together. SYM's 50 year track record of uncommon service to corporate executive clients means you can trust SYM to bring together – and keep together – what's most important to you.

Secure the benefits. SYM's advisory team works regularly in the complex space of executive wealth planning and strives to optimize clients' personal wealth potential.

Credentials do matter. SYM advisory teams are composed of Certified Financial Planners (CFP®), Financial Planning Qualified Professionals (FPQP™), Chartered Financial Analysts (CFA), Accredited Investment Fiduciary (AIF®), Juris Doctorate (JD), MBA, MSA, CPA and others with advanced designations and degrees.

SYM Financial Advisors Commits

- To **empower** advisory teams to deliver an uncommon level of personal service
- To **act** in the client's personal best interest while holding ourselves to industry-leading standards of professional behavior and ethics
- To **anticipate** your needs for the future
- To **pursue** informed, unbiased investment selections and **commit** to ongoing monitoring
- To **communicate** conscientiously and with integrity
- To **build** trusted relationships that flourish for a lifetime

Since 1968, SYM has worked to **anticipate clients' financial needs** and **deliver results.** As an independent Registered Investment Advisor (RIA) we bring depth and breadth to financial planning and investment management for individuals, business owners, corporate executives, healthcare professionals, and to the design and implementation of employer-sponsored retirement plans. **Contact us for a conversation at 800-888-7968 or info@sym.com.**

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