SYM FINANCIAL ADVISORS

Indiana - *Winona Lake, Fort Wayne, Indianapolis, Mishawaka*
Michigan - *Midland* | *sym.com* | *800-888-7968*

BUSINESS OWNER WEALTH PLANNING BLUEPRINT

What could we accomplish with this type of partnership?

After 50 years in business, we've had the opportunity to observe what works in successful businesses. Among other things, we know it takes an adventurous spirit to become a business owner. So we ask the right questions, listening for cues to inform us about the issues you face.

Look to SYM as your thought partners and advocates, helping to keep you in front of competitive challenges, today and tomorrow.

- Succession planning is a strategic cornerstone of our business owner relationships
- SYM provides assistance with buy/sell arrangements and ownership structure
- Plan for death or disability
- Maintain efficiency through growth and changes
- As the hub of your professional resource wheel, SYM brings the right people together to help you accomplish your goals
- SYM's Employer-Sponsored Retirement Plan team is an in-house resource for plan selection and implementation

The word SYM means *together*. SYM's 50+ year track record of uncommon service to entrepreneurs and business owners means you can trust SYM to bring together – and keep together – what's most important to you.

SYM WEALTH MANAGEMENT

BUSINESS BLUEPRINT

Secure the benefits. SYM's advisory team already knows the path business owners take in an effort to create wealth. As an independent, Registered Investment Advisory firm and fee-only fiduciary working for your best interest, now we want to know and serve you.

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 Doctor (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 a fee-only independent Registered Investment Advisor (RIA) we bring depth and breadth to financial planning and investment management for individuals, business owners, corporate executives, medical and dental 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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