Strategic Financial Associates, LLC

Strategic Financial Associates, LLC (SFA) is financial planning, investment advisory and wealth management firm that specializes in working with executives, business owners, affluent individuals and families. Committed to the belief that the only plan that truly succeeds is customized to fit your individual needs, we take exceptional care to understand your specific financial situation, goals and objectives, time horizon and risk tolerance. Utilizing the best analytical tools available to us, we design and continually monitor your plan to ensure optimal results and continued relevance given changes in your life. Whether you are in the accumulation, preservation or distribution phase of your financial life, we can assist you in the design and management of a truly customized solution.

Headquartered in Bethesda, Maryland, we are a national firm and currently work with clients in 40 states across the country.

What Sets Us Apart?

While many advisors focus on various individual components of their clients' lives, we strive to understand your entire financial picture. We advocate a holistic approach because the best results are achieved when plans are developed, executed and amended in consideration of all the possible factors impacting our financial security. No matter how simple or complex your situation may be, our ultimate goal is to help you achieve both personal and financial well-being.

Passionate about our commitment to outstanding client service, we pride ourselves on maintaining continual communication. Staffed with over twenty-five professionals who are each responsible for a particular area of expertise, our firm is uniquely equipped to address all of your planning and investment needs. No inquiry is too big or too small. We encourage all of our clients to reach out to us with any questions or concerns.

What We Offer

SFA offers expertise and assistance in the areas of comprehensive financial planning, risk management and wealth management. Leveraging our internal talents and professional partnerships, we are uniquely qualified to advise on a full continuum of personal and business issues, including:

Financial Planning
Asset & Liabilities Assessment
Income & Expense Analysis
Cash Flow Projections
Tax Planning Expertise

Wealth Management Solutions
Stocks, Bonds, Mutual Funds & ETFs
Separately Managed Accounts (SMAs)
Advisor Directed Portfolios
Unified Managed Accounts (UMAs)
Fixed & Variable Annuities

Retirement Planning
Traditional & Roth IRAs
401(k)s; 403(b)s
Pension & Profit Sharing Plans

Executive Planning & Benefits
Key Man Insurance
Buy-Sell Strategies
Split Dollar Agreements
Deferred Compensation Plans
Executive Bonus Plans

Estate & Legacy Planning
Asset Conservation & Transfer
Business Succession Planning
Charitable Gifting Strategies
Educational Funding

Group Benefits
Plan Design & Administration
Major Medical/Dental/Vision
Life & Disability Coverage
Section 125/Cafeteria Plans

Risk Management
Life Insurance
Health Insurance
Disability Insurance
Long Term Care Insurance

Confident that you would benefit from a complimentary consultation, we invite you to **call us at 301.214.6700 or email us at jadkins@sfafn.com.**

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