



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

Risk Management

- Life Insurance
- Health Insurance
- Disability Insurance
- Long Term Care Insurance

Group Benefits

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

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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