SCHNEIDER DOWNS
Wealth Management

VOYAGE PROGRAM

by Schneider Downs Wealth Management Advisors, LP

VOYAGE PROGRAM

At Schneider Downs Wealth Management Advisors, we understand that financial decisions can be complex throughout all stages of life, and the process of building wealth looks different for everyone. As a result, we've developed the Schneider Downs Wealth Management Voyage program. This program focuses on individuals and families who recognize the value of developing a financial plan as the foundation for a secure financial future. The Voyage program offers you assurance, knowing your financial future is overseen by a diverse group of experienced professionals with your best interests in mind.

Voyage Program Services

We are committed to providing you financial advice and guidance throughout your lifetime. Our program offers a suite of financial planning services and resources for every step of your journey.

Financial Planning Services

- Cash Flow Analysis
- Balance Sheet Review
- Debt Management
- Risk Management Analysis
- Retirement Planning
- Education Planning
- Estate Review
- Social Security Planning

Investment Management

- Asset Allocation Analysis
- Risk Assessment
- Year-End Tax Loss Harvesting
- Annual Financial Checkup Meeting
- Quarterly Portfolio Reviews
- Investment Commentary
- Cash Management Service
- In-House Portfolio Management

Our Methodology

Our collaborative approach allows you to be involved in the process while having confidence in the expertise and services that we provide. Because we believe that working together to set and achieve goals is the best way to bring about success, we will work alongside you to develop a relationship as your trusted advisor and to prepare you for the financial decisions that life brings. As your financial needs change, our team will work with you to develop new strategies and incorporate more services into your plan to keep you on track.

Why the Voyage Program?

As a Registered Investment Adviser, we take pride in our fiduciary role and are committed to working in your best interest. From selecting investment options to keeping you focused on your long-term financial goals, our collaborative approach to financial planning provides proactive solutions and investment options to help you stay on track.

As a client of the Voyage program, you will have access to our team of experienced professionals, including Certified Financial Planner™ Practitioners, Chartered Financial Analysts®, Certified Public Accountants, Juris Doctorate degree holders, Accredited Investment Fiduciary™ Advisors, a Chartered Alternative Investment Analyst, a Certified Investment Management Analyst®, and licensed insurance agents.

Ready to Get Started?

At the heart of our Voyage program is learning about your unique long-term financial goals. Let's get together and talk about you. Visit us at www.sdwealthmanagement.com or email sdwealthmanagement@schneiderdowns.com.

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