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The further you go in your financial life, the more complex it becomes. Thats why you need a partner who can help you plot a course. The Edelman Financial Engines office in Staten Island is here for you, serving the island and surrounding areas in New York and New Jersey. Whether youre accumulating wealth, transitioning into retirement or strengthening your legacy, your financial planner is by your side along the way. From tax planning to estate planning, your planner can also tap into our in-house experts for an extra layer of financial planning insight as well as our client service associates who can provide you with additional resources and support. Qualifications Firm CRD# 104510 Compensation/Fee Fee-Only, Based on Assets Office Location 900 South Avenue, Suite 203, Staten Island,NY 10314 Phone Number 877-208-7414 Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. We were founded on the belief that all investors - not just the wealthy - deserve access to personal, comprehensive financial planning and investment advice. Today, we are America's top independent investment advisory firm as recognized by Barron's1 (September 2024, based on data within a 12-month period). With 143+ offices across the country and 1.3 million clients (as of September 30, 2024), we manage more than $300 billion in assets. 1.The Barron's 2024 Top 100 RIA Firms list, a ninth-year ranking of independent advisory firms, is qualitative and quantitative, including assets managed by the firms, technology spending, staff diversity, succession planning and other metrics. Firms elect to participate but do not pay to be included in the ranking. Ranking awarded each September based on data within a 12-month period. Investor experience and returns are not considered. Savvy Advisors Qualifications CRD# 2790531 Firm CRD# 318493 Compensation/Fee Fee-Only, Hourly, Flat Fee, Based on Assets Office Location 363 Bond Street, Apt 205, Brooklyn,NY 11231 Phone Number 917-590-0552 Louis is dedicated to helping his clients solve the financial puzzle of their lives. He focuses on long-term planning and comprehensive wealth management for attorneys, business executives, retirees, and trustees. Louis incorporates the lessons of behavioral finance into his work. He believes that by avoiding emotional mistakes, particularly during times of financial upheaval, clients can be better positioned to achieve their goals. Louis's approach to wealth management seeks to address each client's day-to-day liquidity needs, retirement income goals, and the longer-term legacy they wish to create. He has earned advanced certifications including the Chartered Financial Analyst, Certified Financial Planner TM and Certified Private Wealth Advisor designations. This training enables Louis to provide sound advice in many areas, including cash flow management, investment management, retirement planning, trust and estate planning, and tax mitigation. Louis became interested in financial services at a young age while watching his father, an accountant, provide tax services to friends and family. Reading about Warren Buffett and other great stock pickers added to his fascination with the markets. He started his career in 1997 at Bankers Trust. The firm was purchased by Deutsche Bank, where Louis worked as a portfolio analyst and then as a portfolio manager. He joined PNC Wealth Management as an investment advisor in 2015 and moved to UBS in December 2020. Louis founded Prestiq Wealth Partners and joined Savvy Wealth in 2024. About Savvy Advisors Savvy Wealth is a modern wealth management firm. We pair you with a dedicated financial advisory team to handle your holistic wealth management needs, including financial planning, investment management, tax optimization, estate planning, retirement planning, and more. We help take control of your financial future so that you can live the life you aspire to live. Visit www.savvywealth.com to learn more. Savvy Wealth Inc. is a technology company and parent company of Savvy Advisors Inc., a Registered Investment Advisory Firm (Savvy Advisors DBA Savvy Wealth). Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Tax Advice and Services, Legal Advice and Services, Estate Planning & Trusts, Insurance Products & Annuities Ameriprise Financial Services, LLC Qualifications CRD# 4022345 Firm CRD# 6363 Series 7, 63 Compensation/Fee Fee-Based, Commissions, Flat Fee, Based on Assets Office Location 481 8th Avenue, Suite 1130, New York,NY 10001 Phone Number 212-967-1428 Financial Advice, Investments, and Insurance. People come to me with complex financial issues. I help them understand their current situation. Together, we develop a plan to help achieve their financial needs and goals. About Ameriprise Financial Services, LLC Putting clients first; it's what I do I'm proud to be associated with a firm known for its service and how it relates to clients, because serving your interests is my priority. I offer comprehensive financial advice and a broad range of solutions to help you and your loved ones live brilliantly, now and in the future. With the right financial advisor, life can be brilliant. Advisor is licensed/registered to do business with U.S. residents only in the states of AZ, CA, CT, DE, FL, GA, IN, IL, IA, NC, NJ, NY, NV, MA, PA, VA. Investment advisory services and products are made available through Ameriprise Financial Services, LLC, a registered investment adviser. An Ameriprise Financial Franchise Ameriprise Financial can not guarantee future financial results. Certified Financial Board of Standards, Inc. (CFP Board) owns the CFP certification mark., the CERTIFIED PLANNER certification mark, and the CFP certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements. Third-party information and opinions, including those available through provided links, are believed to be reliable, but accuracy and completeness cannot be guaranteed by Ameriprise Financial. They are given for informational purposes only, are not intended to be used as the sole basis for investment decisions and may not meet the particular needs of an individual investor. Ameriprise Financial and its representatives do not give legal or tax advice. You should seek the advice of professionals, as appropriate, regarding the evaluation of any specific information or advice. The Confident Retirement approach is not a guarantee of future financial results.Ameriprise Financial cannot guarantee future financial results. Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value. Ameriprise Financial, Inc. and its affiliates do not offer tax or legal advice. Consumers should consult with their tax advisor or attorney regarding their specific situation. Ameriprise Financial Services, LLC, Member FINRA and SIPC. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Tax Advice and Services, Estate Planning & Trusts, Insurance Products & Annuities Qualifications Firm CRD# 104510 Compensation/Fee Fee-Only, Based on Assets Office Location 340 Madison Avenue, New York,NY 10173 Phone Number 877-208-7414 Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. We were founded on the belief that all investors - not just the wealthy - deserve access to personal, comprehensive financial planning and investment advice. Today, we are America's top independent investment advisory firm as recognized by Barron's1 (September 2024, based on data within a 12-month period). With 143+ offices across the country and 1.3 million clients (as of September 30, 2024), we manage more than $300 billion in assets. 1.The Barron's 2024 Top 100 RIA Firms list, a ninth-year ranking of independent advisory firms, is qualitative and quantitative, including assets managed by the firms, technology spending, staff diversity, succession planning and other metrics. Firms elect to participate but do not pay to be included in the ranking. Ranking awarded each September based on data within a 12-month period. Investor experience and returns are not considered. Qualifications Firm CRD# 110130 Series 65, 66 Compensation/Fee Fee-Only, Based on Assets Office Location 445 Park Avenue, 6th Floor, New York,NY 10022 Phone Number 212-796-8732 With nearly four decades of experience, including recognition by Barron's, Forbes, the Financial Times and Bloomberg, our team has the expertise and the passion to successfully guide our clients' portfolios through a myriad of market conditions. We lead with a comprehensive financial plan that puts your goals and dreams first, then support it with world class investment strategies. Only by placing you at the core of everything we do can we truly meet your needs. We've found that the most successful solutions begin by asking the right questions, which is why we offer complimentary consultations to explore a professional relationship. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Tax Advice and Services, Estate Planning & Trusts Qualifications Firm CRD# 302050 Compensation/Fee Fee-Only, Flat Fee, Based on Assets Office Location 4 World Trade Center, New York,NY 10019 Phone Number 646-494-2925 Farther is a first-of-its-kind wealth management platform that combines the benefits of modern technology with the expertise and human touch of traditional wealth management. Backed by Bessemer Venture Partners, Context Ventures, Cota Capital, and Moneta Venture Capital, Farther caters to high-net-worth professionals who are building generational wealth and need a more holistic approach to managing their money. While there are more financial products and tools available than ever, until Farther, no solution delivered both a beautiful, well-designed technology experience and a solution to handle the complex and multifaceted nature of significant wealth. Advisory Services Provided: Financial Planning, Portfolio Management, Wealth Management, Estate Planning & Trusts Qualifications Firm CRD# 104510 Compensation/Fee Fee-Only, Based on Assets Office Location 51 John F Kennedy Parkway, Suite 270, Short Hills,NJ 07078 Phone Number 877-208-7414 Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. We were founded on the belief that all investors - not just the wealthy - deserve access to personal, comprehensive financial planning and investment advice. Today, we are America's top independent investment advisory firm as recognized by Barron's1 (September 2024, based on data within a 12-month period). 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I often describe it like a map, first assessing where you currently stand and where you aspire to be. Much like a GPS, my role is to guide you along the most effective path, helping you stay on track toward your goals despite life's inevitable twists and turns. Since circumstances can change unexpectedly, I believe it's crucial to regularly revisit and adjust your plan, ensuring it remains aligned with your evolving needs and aspirations. To create a truly personalized financial strategy, I begin by conducting a thorough assessment of your financial situation, goals, and risk tolerance. This involves gathering comprehensive information about your income, assets, liabilities, employer benefits, future financial goals, and any potential challenges you may face. By understanding the full scope of your unique circumstances, I can develop a customized financial plan that is precisely aligned with your priorities. I prioritize flexibility, considering key factors such as your age, career stage, family dynamics, and investment preferences. I also account for life events -- like marriage, children, home purchases, or retirement -- that can significantly influence your financial decisions. This approach ensures that your financial plan is not only proactive and adaptable but also evolves as your circumstances change. By continually monitoring your progress and making adjustments as necessary, I provide ongoing guidance that helps you stay on course and pursue your goals, no matter what life brings. When I'm not working, I enjoy spending quality time with my wife, Taylor, and our daughter, Ember. We're always looking for fun weekend activities to give her the best life experiences. Outside of family time, we enjoy hiking, traveling, and unwinding on the beach -- each offering a perfect way to recharge. Click here to schedule a complimentary meeting with me. About BroadFront Capital Management BroadFront specializes in working with high-net-worth individuals and families, including family offices. Our clients span a broad spectrum of professions and stages of life - from the accumulation to the distribution phase of retirement. We also work collaboratively with attorneys, accountants, and other professionals to holistically address all of our clients' needs under one roof. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Tax Advice and Services, Estate Planning & Trusts, Insurance Products & Annuities Qualifications Firm CRD# 104510 Compensation/Fee Fee-Only, Based on Assets Office Location 328 Newman Springs Road, Suite 1, Red Bank,NJ 07701 Phone Number 877-208-7414 Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. We were founded on the belief that all investors - not just the wealthy - deserve access to personal, comprehensive financial planning and investment advice. Today, we are America's top independent investment advisory firm as recognized by Barron's1 (September 2024, based on data within a 12-month period). With 143+ offices across the country and 1.3 million clients (as of September 30, 2024), we manage more than $300 billion in assets. 1.The Barron's 2024 Top 100 RIA Firms list, a ninth-year ranking of independent advisory firms, is qualitative and quantitative, including assets managed by the firms, technology spending, staff diversity, succession planning and other metrics. Firms elect to participate but do not pay to be included in the ranking. Ranking awarded each September based on data within a 12-month period. Investor experience and returns are not considered. Palmerston Group Advisors, LLC Qualifications CRD# 4716523 Firm CRD# 128733 Series 66 Compensation/Fee Fee-Based, Flat Fee, Based on Assets Office Location 320 Raritan Avenue, Suite 302, Highland Park,NJ 08904 Phone Number 732-248-5777 Peter Gellman is the Managing Member of Palmerston Group Advisors, L.L.C. Founded in 1997, Palmerston Group provides independent, unbiased financial and investment advisory services based on fundamental analysis and margin of safety principles. Peter Gellman has worked as a teacher, analyst, and advisor. Before starting Palmerston, he taught at Oxford as a member of its international relations faculty, as well as at Princeton, where he was Research Fellow and Lecturer in the Woodrow Wilson School of Public and International Affairs. He holds a law degree as well as a Ph.D. in international relations. About Palmerston Group Advisors, LLC Palmerston Group Advisors, a firm best known for its Margin of Safety discipline, built its strategy only after carefully studying the best in the business. Consider: 1. Few fund managers have genuinely market-beating records of ten or more years. 2. Most of this elite group uses a version of Margin of Safety, the skill of buying assets when "on sale" at a deep discount to their true value. Most excel in bear markets. 3. Few advisors strategically focus on these top managers or their investment ideas when creating client portfolios. Nor do many independent firms focus on these managers when offering allocation advice. In contrast, Palmerston sees these top managers as a huge asset for our clients. We start with what works best, and thus use Margin of Safety for all clients. For client portfolios, we use the ideas and often the (no-load) funds of managers with proven, profitable records. Bleakley Financial Group Qualifications CRD# 4695659 Firm CRD# 318366 Series 6, 7, 65, 66 Compensation/Fee Fee-Based, Flat Fee Office Location 100 Passaic Avenue, Suite 300, Fairfield,NJ 07004 Phone Number 973-244-4237 Frank Lepore's mission is to provide financial security strategies by taking a holistic approach to the planning process while providing his clients with top notch service and technology. Understanding client goals is a vital part of Frank's process in order to put together an intelligent, thoughtful plan. What sets Frank apart even more is his large team who help provide the level of service that clients deserve. Frank attended Montclair State University and received a Bachelor of Science in Business, with a concentration in Finance. Frank is registered as a Wealth Management Advisor with Bleakley Financial Group and a registered representative with LPL Financial. About Bleakley Financial Group For more than 30 years, the Bleakley Financial Group team* has been providing customized financial planning and wealth management services to a diverse array of clients across the country. As an independent firm, we pride ourselves on delivering personalized guidance to fit the goals and lifestyle needs of each customer. With more than three decades of experience, our state-of-the-art financial planning comes with a personal touch. Our team consists of more than 100 investment professionals, from financial advisors and research assistants to client support associates. Comprehensive Financial Planning and Wealth Management. Bleakley has created a collaborative culture of innovation and excellence that's unmatched in the industry. At Bleakley Financial, you're our top priority, and we're committed to turning your financial vision into reality. *The Bleakley Financial Team has been providing wealth management services since 1985 within various firms. Bleakley Financial Group, LLC was founded in 2015. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, Wealth Management, Risk Management, Education Funding and Planning, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Insurance Products & Annuities Qualifications Firm CRD# 104510 Compensation/Fee Fee-Based Office Location 650 From Road, Suite 460, Paramus,NJ 07652 Phone Number 877-208-7414 Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. We were founded on the belief that all investors - not just the wealthy - deserve access to personal, comprehensive financial planning and investment advice. Today, we are America's top independent investment advisory firm as recognized by Barron's1 (September 2024, based on data within a 12-month period). With 143+ offices across the country and 1.3 million clients (as of September 30, 2024), we manage more than $300 billion in assets. 1.The Barron's 2024 Top 100 RIA Firms list, a ninth-year ranking of independent advisory firms, is qualitative and quantitative, including assets managed by the firms, technology spending, staff diversity, succession planning and other metrics. Firms elect to participate but do not pay to be included in the ranking. Ranking awarded each September based on data within a 12-month period. Investor experience and returns are not considered. Mml Qualifications CRD# 5127697 Firm CRD# 10409 Series 7, 9, 10, 24, 52, 53, 66 Compensation/Fee Fee-Based, Hourly, Commissions, Flat Fee, Based on Assets Office Location 900 Stewart Ave #260, Garden City,NY 11530 Phone Number 646-805-8842 William Romero has been a leader in Wealth Management and the Financial Services Industry for 2 decades. He began his career at JPMorgan and for almost a decade lead as a Market Director for their Private Client Group. Leading large teams of financial professionals in both Southern California and New York, William also had oversight of their International Division. In addition, he was Vice President for AXA Advisors and a Top Partner at New York Life (2017). William led the start and growth to $1 Billion as an SVP of an Ameriprise office. William puts people first and is passionate about helping resolve problems. His experience and track record of success led him to a Senior Vice President/Partnership role at Iron Birch Advisors a platinum Financial Advisory firm of Ameriprise Financial before joining Lee, Nolan & Koroghlian, LLC in 2023. His inspiration comes from giving back to the community and helping educate families that traditionally do not have access to financial literacy. Wiliam is passionate about helping people achieve their goals and is committed to being an advocate and trusted resource for each client. Outside of his career in wealth management, William is also the 2-time President for the National Association of Hispanic Real Estate Professionals Queens NY, the largest Latino Trade Organization in the world. He is also an active speaker for ALPFA NY, the former President of PorColombia New York and a Board Member of Mindot, an educational non-profit. He's also a proud supporting sponsor of the FDNY Hispanic Society. William received his BBA in Finance at Baruch College in New York City and holds his Series 7, 63, 52, 53 and 24 securities registrations. He is life, accident, and health insurance licensed in NY, NJ, NC, GA and FL. About Mml We're committed to helping you achieve your financial goals. As a leading independent broker-dealer and registered investment adviser, we understand that quality investment products, advice, and services are critical elements to successful investing. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Tax Advice and Services, Legal Advice and Services, Estate Planning & Trusts, Insurance Products & Annuities Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. We were founded on the belief that all investors - not just the wealthy - deserve access to personal, comprehensive financial planning and investment advice. 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Port Capital Management Qualifications CRD# 5679112 Firm CRD# 330252 Series 7, 63, 65, 66 Compensation/Fee Fee-Only, Flat Fee, Based on Assets Office Location 684 Broadway, Massapequa,NY 11758 Phone Number 212-597-2249 Anthony Errico is a seasoned private wealth advisor with a distinguished 15-year career at Goldman Sachs, one of the world's leading financial institution. Specializing in wealth management for ultra-high-net-worth individuals he has extensive experience in guiding clients through their wealth creation events. Anthony's philosophy centers on building long-term relationships based on trust and transparency. Beyond his professional achievements, Anthony is also actively involved in his community, volunteering his time and expertise to support various charitable organizations such as Island Harvest. In his leisure time, Anthony enjoys spending quality time with his wife and two daughters. About Port Capital Management We are stewards of your financial aspirations, committed to guiding you through the complexities of wealth management with impact, integrity, and independence. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Investment Advice & Management, Tax Advice and Services, Estate Planning & Trusts Lpl Qualifications CRD# 6676325 Firm CRD# 6413 Series 7, 66 Compensation/Fee Fee-Based, Commissions, Flat Fee, Based on Assets Office Location 660 White Plains Rd, Suite 530, Tarrytown,NY 10591 Phone Number 347-342-2419 John Traut - Wealth Advisor and Firefighter John is a dedicated wealth advisor who is passionate about helping individuals, families, and businesses achieve meaningful progress toward their financial goals. With years of experience in wealth management, John focuses on providing personalized strategies tailored to each clients unique needs. Whether it's planning for retirement, managing investments, or optimizing business finances, John works closely with clients to guide them toward long-term financial freedom or independence. In addition to managing wealth, John serves as a trustee on the board of a non-profit organization, where he brings his expertise in finance and community service to support the organizations mission. This role allows him to combine his professional skills with a deep commitment to giving back, ensuring the non-profit continues to positively impact the community. As a passionate firefighter, John dedicates his time and energy to protecting and serving his local community. His role in the fire service reflects his commitment to public safety, teamwork, and courage, qualities that extend to his work as a wealth advisor. Whether on the fireground or in the office, John strives to make a difference by supporting others and responding to their needs. When not working, John enjoys spending time outdoors, particularly running and freshwater fishing. These activities offer him a balanced approach to life, allowing him to relax, recharge, and connect with nature. Running fosters discipline and personal achievement, while fishing provides moments of peace and reflection. Both activities help John maintain a healthy work-life balance, ensuring he has the energy and clarity needed to continue providing personalized service to clients and the community. Above all, John is driven by a passion for helping people. Whether its guiding a family through the complexities of financial planning or working on a life-saving mission as a firefighter, John strives to positively impact every aspect of his life. By blending expertise in wealth management with a deep commitment to service, he continues to make a meaningful difference in the lives of those he serves. About Lpl At LPL Financial, financial advisors have the freedom they deserve to choose the business model, services, and financial technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships because they know their clients best. LPL's mission is to take care of our advisors, so they can take care of their clients. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Insurance Products & Annuities Qualifications Firm CRD# 288239 Series 7, 66 Compensation/Fee Fee-Based, Flat Fee, Based on Assets Office Location 1 Corporate Drive, Suite 225, Shelton,CT 06484 Phone Number 475-600-2501 At Procyon, we believe open communication, strong accountability and demonstrated value are paramount to building lasting client relationships with individuals, institutions and employers. We are our clients trusted financial partner, working to simplify the complex so they have peace of mind while pursuing their financial goals. As your strategic partner and advisor, we work collaboratively with you to find creative and flexible investment solutions that are tailored to meet your needs. This requires us to have a deep toolkit, to be astute in our advice and committed to delivering the best outcome for all parties. You can depend on Procyon, every step of the way. Advisory Services Provided: Financial Planning, Portfolio Management, Retirement Planning, 401K Rollovers, Wealth Management, Money Management, Risk Management, Education Funding and Planning, Financial Advice & Consulting, Financial Planning for Individuals, Financial Planning for Businesses, Investment Advice & Management, Tax Advice and Services, Estate Planning & Trusts, Insurance Products & Annuities Since 1986, Edelman Financial Engines has been committed to always acting in the best interests of our clients. 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Investor experience and returns are not considered. = Featured ProviderBest Financial Advisors Serving Staten Island67 Forest St, Suite 271, Staten Island, NY01752Visit WebsiteLicense: 5813774Google5.0 (5)Financial planning can be challenging; Cedar Hill Financial Group simplifies things. Their first priority is always acting in their client's best interest. That means providing personalized, comprehensive financial advice, along with data driven portfolios. Whether it is planning for retirement, saving for college, or getting a comprehensive financial plan in place, they can help. With over a decade of industry experience, they are committed to helping clients pursue their financial goals. Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. Estate PlanningCertified Financial Planner (CFP)Investment ManagementTax PlanningRetirement PlanningOpen in gallery viewBest Financial Advisors Serving Staten IslandVisit WebsiteLicense: 317004Datalign Advisory, Inc. is reshaping the financial services industry landscape for clients in Provo and throughout Utah. By harnessing cutting-edge AI technology, the company connects individuals with financial advisors tailored to their unique needs. This streamlined approach removes traditional barriers and ensures clients receive expert guidance. Each advisor undergoes a meticulous vetting process, seeking to ensure that clients receive expert recommendations on matters such as tax strategies, retirement mapping, and estate planning. Datalign Advisorys commitment to innovation and accessibility has earned recognition as a leader in wealth management solutions that make expert financial advice attainable for investors of all backgrounds. Investment ManagementFinancial PlanningFinancial AdvisorsOpen in gallery viewBest Financial Advisors Serving Staten IslandSmartAsset's free, five-minute tool makes it easy to find qualified financial advisors in your area. The exclusive tool uses a quick survey to help SmartAsset's exclusive algorithm match you with up to three advisors based on your specific financial needs. Each advisor is a fiduciary, legally bound to work in your best interest, and rigorously vetted by SmartAsset. You can speak with each for free, sometimes within a matter of minutes, and choose whom you want to work with. Hundreds of thousands of smart investors and retirees have already used SmartAsset's simple, no-cost service to find the right financial advisors for them. Best Financial Advisors Serving Staten Island101 Tyrellan Avenue, Staten Island, NY10309Google5.0 (1)Richmond Wealth Management is a company that serves the complex financial planning needs of high-net-worth individuals and families in Staten Island. It is committed to helping clients develop a strategy to manage and preserve wealth. The company's financial advisors work closely with clients to assist in education, investment, and retirement planning. Additionally, they provide investment products and services through Member SIPC, Wells Fargo Advisors Financial Network, LLC, and non-bank affiliate of Wells Fargo & Company. Managing partner Solomon Chemo is a Certified Financial Planner. Estate PlanningCertified Financial Planner (CFP)Retirement PlanningBest Financial Advisors Serving Staten Island1110 South Avenue, Staten Island, NY10314Biagini Grassi Advisory Group, LLC, is a financial consultancy agency based in Staten Island. It was founded by Mark V. Biagini and Anthony Grassi, Jr. and has been serving clients since 2004. The firm assists clients from all age groups, with a focus on people who are close to retirement or are already retired. It aims to help these clients with retirement income challenges. It can assist them with pension plan evaluations and calculate plan benefits. Retirement PlanningCertified Financial Planner (CFP)Best Financial Advisors Serving Staten Island1000 South Avenue, Staten Island, NY10314Google5.0 (1)Guided Professional Solutions LLC serves Staten Island clients who need financial advice. Its team provides retirement planning, investment management, estate planning, and liability management services. Its financial planners provide necessary updates to their clients to come up with informed decisions relevant to tax issues, insurance, income and expense, inflation, and economic status. Since 1980, Guided Professional Solutions has been supporting individuals to address personal or business financial goals. Its team has 150 years of combined relevant industry experience. Certified Financial Planner (CFP)Best Financial Advisors Serving Staten Island1000 South Avenue, Staten Island, NY10314BH Wealth Management serves Staten Island clients who need financial advice. The company has established an advanced planning group composed of MBAs, attorneys, and Certified Finacial Planners. Through one-on-one consulting, they help clients tackle complicated planning issues related to all areas of their financial life. They also provide retirement planning. Couple Jaimie M. Blackman and Iris Hershenson founded the company and have been directing the company since 2009. Hershenson is an educator who is inclined to computer applications and internet technologies. Certified Financial Planner (CFP)Retirement PlanningBest Financial Advisors Serving Staten Island805 3rd Avenue, New York, NY10022Google3.0 (4)Herold & Lantern Investments is a family-owned wealth management boutique catering to Staten Island individuals, institutions, and families. Its services include insurance solutions, investing services, investment banking, wealth advisory, and fixed income sales and trading. Additionally, it offers a wide array of brokerage products and insight for bond investors. The broker-dealer firm holds more than three billion in tri-party and customer assets. Chief Operating Officer Larry Herold is a member of the New York Society of Security Analysts. Insurance ProductsPrivate Wealth AdvisorBest Financial Advisors Serving Staten Island847 Broadway, Bayonne, NY07002Visit WebsiteLicense: 2117182Facebook5.0 (11)Google5.0 (1)FFP Wealth Management serves individuals, families, and businesses in Staten Island and the surrounding communities. The team of financial advisors proffers services that include retirement, investment, education, and estate tax planning. Other services focused on families and individuals are professional money management, individual insurance, and IRA and 401(k) rollovers. It offers companies programs for business insurance analysis and succession planning. John Graziano, CFP, CPA, PFS, is the president of FFP Wealth Management. He regularly participates in training sessions with other tax and finance professionals. Estate PlanningInsurance ProductsRetirement PlanningBest Financial Advisors Serving Staten Island1919 Hylan Boulevard, Staten Island, NY10305Google4.0 (9)AJC Advisors serves the financial advisory needs of individuals and businesses in Staten Island and nearby areas. It provides assistance in investment products such as common stocks, bonds. brokerage accounts, IRAs, treasury bills, and government securities. It creates and monitors retirement, tax, college, and estate plans. It also helps clients acquire insurance products, which include life, long-term care, and disability income insurance. The company's president, John Coscia, is a registered representative of the American Portfolio Financial Services, Inc. Estate PlanningInsurance ProductsCertified Financial Planner (CFP)Best Financial Advisors Serving Staten Island70 Floral Avenue, Murray Hill, NY07974Visit WebsiteLicense: 4236082Google5.0 (1)Inspire Investment Solutions offers financial planning services to individuals and families in Staten Island. Based on the goals of clients, its advisors develop a plan for them to achieve financial security. The solutions offered by the team members include retirement planning and savings accounts, asset management, insurance evaluation, and education planning. They also cater to individuals who are planning to start a new business. Founder and president Michael Anicito started his career at large financial institutions over 10 years ago. Best Financial Advisors Serving Staten Island95 New Dorp Lane, Staten Island, NY10306Visit WebsiteLicense: 104556Facebook5.0 (42)Google5.0 (3)John J. Vento, CPA, MBA, CFPthrough Comprehensive Wealth Management, Ltd.is a financial advisor who caters to clients in Staten Island. He offers bookkeeping and records filing for various types of businesses, from startups to statewide companies. His firm reviews each client's annual expenses and tax forms to determine possible returns. It also compiles financial records to report on a company's increased or decreased profits and returns. John J. Vento can provide monthly or annual feedback on company finances and banking loans. Tax PlanningPrivate Wealth AdvisorBest Financial Advisors Serving Staten Island633 Morris Avenue, Springfield, NY07081Visit WebsiteLicense: 2222678Facebook5.0 (9)Google5.0 (8)Stephen Ng Financial Group serves families, individuals, and business owners in and around Staten Island. It provides income planning assistance, which covers concerns regarding monthly income estimates and retirement savings to retirement income conversions. Its team of financial advisors also helps clients manage their investments and assets. They also assist clients in translating their estate planning needs and coordinate with their CPAs and attorneys in the process. Company founder Stephen Ng is a Chartered Financial Consultant. He has been in the industry since 1992. Estate PlanningTax PlanningRetirement Planning

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