SCOTTSDALE
Wealth Advisory

Scottsdale Wealth Advisory: Invest With Purpose For A Successful Retirement

August 15, 2019
By Zoey Thompson

Scottsdale Wealth Advisory is one of the most respected financial advisory service providers in the Southwestern US, offering full service financial management, educational resources and events to the public.

Scottsdale, AZ - "Invest Confidently, Retire Your Way" is a motto of Scottsdale Wealth Advisory (SWA), a Scottsdale-based financial management firm founded on the principles of fiduciary duty, independence, & transparency. As company-sponsored pension plans continue to decline, retirees today increasingly face the challenge of navigating the array of investment choices to support the retirement they desire. Scottsdale Wealth Advisory embraces this challenge and works to educate clients first, empowering them to make more purposeful investment decisions that instill confidence in retirement.

The firm offers full-service financial planning and retirement services that includes education along with fiduciary representation. The team works diligently to cultivate the most advantageous plans specific to each of their clientele. Each member of Scottsdale Wealth Advisory operates with the understanding of the responsibility and trust that their clients place in them and works to continue their own education across financial and tax landscapes.

"Scottsdale Wealth Advisory was launched with a vision and set of principles that we continue to maintain as a firm," explains Senior Vice President David D'Eredita. "We are ever-mindful of our role as a Fiduciary and this mentality of 'client-first' keeps us constantly in motion, whether in continuing education or due diligence. We are out there getting it done for our clients."

By keeping their focus on education, the firm empowers people with the basic financial planning awareness to become a more prudent investor. The process for working with the firm is simple. They schedule an initial meeting where they educate, establish client goals, and then utilize an in-house process to examine assets and earning potential before developing a financial strategy that will meet short, mid, and long-term needs. The plan is discussed with the client so they can work together to revise, implement, and monitor.

"Our client service doesn't stop with their signature," says David. "We are constantly monitoring and adjusting so that we keep our clients on the right path. It is our duty to protect and promote our clients' interests and there is not a single person working at Scottsdale Wealth Advisory that doesn't embrace this."

Financial education, personalized planning, and fiduciary service are the foundation upon which the firm sits, and this trifecta has led to them becoming one of the Southwest's top financial firms. SWA does not only service individual customers and couples, the company also works with family offices to develop financial strategies.

SWA welcomes all those concerned with their financial situation to visit their website,
www.ScottsdaleWealthAdvisory.com.

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