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Bryan S. Slovon

Member through 04/01/2018
Website <http://www.stuartfg.com>
Industry Financial Services
Specialty Financial & Estate Planning, Comprehensive Wealth Management

Description

Bryan S. Slovon is the Founder and CEO of Stuart Financial Group, a boutique financial planning firm exclusively serving retirees and soon-to-be retirees in the DC Metro area. He is a financial planner specializing in retirement planning and wealth preservation to a select group of clients. Bryan has been helping families and retirees reach their financial, retirement and estate planning goals since 1990, building a reputation among clients and colleagues as a personally engaged problem solver. His mission is to help manage and preserve the wealth of his clients and their families, with whom he is dedicated to building life-long relationships of trust.

Bryan's comprehensive approach to financial planning, in particular-looking at his clients' unique tax situation and uncovering incorrect uses of taxable and tax-deferred strategies provides meaningful solutions for clients including potentially lower taxes, decreased market risk, greater income in retirement and proper wealth transfer. He has written numerous reports outlining his strategies for the Senior Market and has been featured in the Wall Street Journal, Financial Planning, OnWallStreet and other local and national media.

Education

Bryan currently holds his securities Series 65 license, he is a Registered Financial Consultant® as well a Comprehensive Wealth Manager offering investment advisory services through Global Financial Private Capital, an SEC registered investment adviser. He is legally bound to upholding the highest levels of fiduciary standards when providing investment advice to clients. He is also life and health insurance-licensed in the states of Maryland and Virginia.

Associations

Mr. Slovon is a member in good standing of the National Ethics Association, the Mid- Atlantic Region Better Business Bureau and the Financial Planning Association. Stuart Financial Group is also a member of the City of Greenbelt Chamber of Commerce.

References

Available upon request. Please call Stuart Financial Group at 301.345.1635 during business hours.

