

OPTIMIZE YOUR FINANCIAL FUTURE



Stambaugh Ness, in partnership with Stonebridge Financial Group, is proud to offer two essential services to help you maximize your financial potential and retirement plan value.

1 Personal Wealth Management

Build, grow, and preserve your wealth with strategies tailored to your unique needs:

- **Customized Financial Planning:**
Strategies that align with your goals.
- **Investment Management:**
Expert guidance to optimize investments.
- **Ongoing Expert Advice:**
Continuous support to adjust to life changes and market trends.

Begin with a complimentary one-hour consultation to explore how we can help unlock your financial potential.

2 Retirement Plan Services

Ensure your retirement plan delivers maximum value. Our benchmarking service offers:

- **Complimentary Fee Report:**
Evaluate your plan fees and compare to industry standards.
- **Advisory Performance Review:**
Assess whether you're getting the best value from your current advisor.
- **Cost Efficiency Check:** Identify opportunities to reduce fees and improve service quality.

Start with a complimentary benchmarking analysis to review your plan's fees and services, ensuring cost efficiency.

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