Stambaugh Ness

STONEBRIDGE FINANCIAL GROUP

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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