Symphonic

FINANCIAL ADVISORS

Orchestrating Your Long-Term Financial Success

*Placing Clients First*SM

Who is Symphonic?

Symphonic Financial Advisors enables advisors and CPAs to bring a new level of artistic and technical excellence in financial services to their clients.

Created by industry experts, Symphonic represents the integration of best practices in financial planning and investment management. Our mission is to deliver intelligently personalized wealth management services based on the proven and reliable methodologies of modern portfolio theory.

Symphonic is able to capitalize on the investment counseling expertise of its affiliate, Rochdale Investment Management. Affluent investors have entrusted Rochdale with their portfolio management for more than 20 years. Symphonic's executive management team has further developed and refined these services.

Symphonic Financial Advisors orchestrates your long-term financial success. Each advisor and CPA acts as the conductor of an orchestra comprised of an ensemble of Symphonic specialists and best practice partners. Symphonic provides the resources for your advisor and CPA to compose a personal financial plan for you. The remarkable collaboration between conductor and orchestra results in a professional wealth management masterpiece for each client.

Our Best Practices Philosophy

Symphonic's financial advisors and CPAs deliver to clients intelligent personalization at a level of service surpassing industry-wide standards. Best practices are based on proven and reliable financial planning and investment management methodologies delivered with a superior level of service:

- Always do what is in the best interest of the client
- Establish a holistic view of each client's financial needs
- Deliver the highest quality conflict-free financial advice
- Identify and integrate the expertise of specialists

Our People

It is a hallmark of Symphonic to have highly qualified professionals. Our financial advisory and investment professionals are appropriately experienced and educated. They typically have achieved one or more professional designations, such as Chartered Financial Analyst (CFA), Certified Financial Planner (CFP®), Certified Public Accountant (CPA), or Accredited Investment Fiduciary (AIF®).

Our corporate culture promotes shared knowledge to ensure Symphonic advisors and CPAs remain at the forefront of industry best practices to serve your evolving wealth management needs.

Our Investment Expertise

Central to the Symphonic framework for managing client investments is asset allocation. The process begins with a clear and objective definition of your risk tolerance, defined primarily by the amount of downside risk you are willing and able to accept. Establishing a personalized asset allocation requires a skilled and experienced financial advisor or CPA to align each client's individual risk tolerance and investment objectives with an appropriate portfolio.

Symphonic leverages Rochdale's investment competence, which has proven successful over various economic and stock market cycles. Client portfolios are developed using the most sophisticated and comprehensive portfolio optimization tools available. Symphonic's investment committee only considers recommendations that are well researched and meet a rigorous set of screening criteria.

Our Intelligent Personalization Services

Symphonic has a full suite of services which we tailor to each client's needs. Our Intelligent Personalization services establish portfolio management and asset allocation as the cornerstone of a successful relationship between you and your advisor. Intelligent Personalization enables you to benefit from a long-term wealth management relationship with meaningful results because it:

- Aligns client, financial advisor, and portfolio manager interests
- Encourages clients to be engaged in the process on an ongoing basis
- Delivers a complete service starting with a sound strategy and evolving as your life changes
- Provides ongoing monitoring and comprehensive reporting

Our Integrity and Ethics

Symphonic Financial Advisors was founded on the principle that the client's best interests always come first. We understand that our reputation begins with establishing trust and credibility, which has as its basis conflict-free advice. The executive team of Symphonic requires the highest standards of ethical behavior to be at the core of everything we do. We believe in full communication of our services, their costs, the benefits, and the value we provide to our clients.

Our signature represents our commitment to orchestrating your long-term financial success.

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Our Comprehensive Wealth Management Services

- Portfolio Management
- Financial Planning
- Wealth Protection
- Tax Planning
- Retirement Planning
- Estate Planning
- Risk Management
- Income Protection
- Multi-Generational Planning
- Insurance Planning
- Education Planning
- Special Situations
- Budgeting
- Business Planning

For more information, please contact Symphonic Financial Advisors.

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