



## FINANCIAL SERVICES ADVISORY



2018 AUM: \$609.05 MILLION

Financial Services Advisory (FSA) was founded nearly 40 years ago with a twist on how to invest. The firm stresses its FSA 'safety net' approach, which is designed to capture the long-term gains of investments and help minimize the impact when they fall. The firm has clients in 40 states, with 12 team members and a branch office in Fort Myers, Florida.

### What's your firm's main goal for the next five years?

The mission of our firm is to manage uncertainty, and we strive to become better, not necessarily larger. That is reflected in our development of future strategies to meet the changing needs of our clients and the advice we provide to help them manage financial uncertainty.



**JAMES JOSEPH** PRESIDENT