Bethesda MAGAZINE

AS SEEN IN THE NOVEMBER/DECEMBER 2022 ISSUE

PROFILES | FINANCIAL PROFESSIONALS

SPECIAL ADVERTISING SECTION

HILARY SCHWAB

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AARON WESTON, CFP®, ADVISOR

Q: Have you considered an exit strategy for assets within your portfolio?

A: Clients come to us in search of finding a financial partner who can help them navigate life as well as the financial markets. They have often worked their entire lives to create a nest egg to support them in retirement, and they want to preserve that nest egg. They are tired of hearing “stay the course, the market will eventually come back.” They want a firm that actually does something versus watching the market reduce the value of their accounts. When market conditions are good, they want to participate. When conditions are not good, they want protection.

Q: What makes us different from other advisory firms?

A: For one thing, we are fiduciaries. That means we are required to put your financial interests above our own in every decision we make. Secondly, we have been around 40 years and as a result, we have helped many people go through similar family and financial issues to what you may be experiencing.

Finally, our FSA Safety Net® approach to investing is quite unlike most firms. Rather than the typical buy-and-hold approach, we adapt portfolios to the current market conditions. For example, if international investments are not generating gains, we don’t own them. Let the FSA Safety Net® help you rest easy at night.

Given the twin threats of inflation and recession that we haven’t seen in our 40 years, now is the time to embrace an active approach that can adapt to what is happening in the markets.