Smedley Financial Services, Inc

In your own words, describe your practice. What makes your practice different from the rest?
We believe in helping you live a meaningful life by focusing on your values and goals as the basis for your financial plan and strategy. As a full service wealth management firm, we integrate everything from asset management to social security strategies to help you through the transitions of your life.

Describe an ideal client for your practice, in general.
If you value the freedom that financial security can provide, whether to build a better life, provide for your family and future generations, or to give to charities, we can help empower you to live the financial life you value.

Describe your customer service model.
We strive to always place our clients' needs first. Frequent communications and regular face-to-face meetings allow us to have open and honest discussions. This helps us to keep our clients informed of changes that may impact them financially. It also keeps us up-to-date on their changing lives.

What is your investment philosophy?
We believe that a consistent investment strategy is critical in this rapidly changing world. We work hard to identify opportunities while focusing on these key objectives:
- You must protect what you have.
- You should be compensated for the risk you take.
- Your investment strategy should mirror your values and goals.

Do you offer financial planning? If so, would you care to elaborate on your process?
Our process begins with a discovery of who you are – your values, goals, and dreams. This information along with Social Security, sources of income, and other critical factors, is used to create your personal financial plan. We will update your plan to keep it relevant as your life changes and to keep you on track to reach your goals.

How would you describe your Risk Management philosophy? Would you care to elaborate under given the volatile market conditions we are currently encountering?
Risk is synonymous with the stock market. Our team of professionals creates personal wealth plans and solutions that compliment your ability and willingness to take risk. Your assets are segmented to provide income during specific periods of time, reducing your risk as you age. We combine the time-tested benefits of diversification with flexible investment strategies to help us meet your risk tolerance objectives.

In your own words, would you describe your cost structure for your services?
Our goal is to align our interests with our clients. With this in mind, we are primarily fee-based.

Smedley Financial Services, Inc.® is an SEC Registered Investment Advisory Firm. Roger M. Smedley, Sharla J. Jessop, James R. Derrick, Rodney A. Walker, Mikal B. Aune, and Shane P. Thomas, Investment Advisory Representatives of Smedley Financial Services, Inc.® and Registered Representatives of Securities America, Inc. Securities offered through Securities America, Inc. Member FINRA/SIPC. Securities America Inc. and Smedley Financial Services, Inc.® are separate entities.

Pictured left to right
Shane Thomas, Advisor Relations;
Rodney Walker, CFP®, Wealth Management Consultant;
James Derrick, CFA, Chief Investment Strategist;
Sharla Jessop, CFP®, Vice President;
Roger Smedley, CFP®, President;
Mikal Aune, CFP®, Wealth Management Consultant

SMEDLEY FINANCIAL SERVICES, INC.®
Investment Management to Maximize Your Time®