

SCHAMING

FINANCIAL CONSULTING GROUP

of Wells Fargo Advisors



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Investment and Insurance Products:

▶ NOT FDIC Insured

▶ NO Bank Guarantee

▶ MAY Lose Value

Why Clients Choose Us

SCHAMING FINANCIAL CONSULTING GROUP is a financial advisor team serving a select group of high-net worth families and individuals both in the New Jersey area and around the country. Their mission is to provide objective timely financial advice to help clients build, manage, protect, and transfer their wealth. Their commitment to this mission is defined by three core principles:

Recognized Experience

- A **highly-motivated advisor** with knowledge and insight on wealth-related issues, that comes from decades of experience and wisdom
- Deciphering noise and volatility allows for a clear understanding of complex financial markets and how best to protect and grow wealth in a challenging environment
- An ongoing commitment to learning keeps us at the forefront of the industry and allows us to offer clients the best solutions for their unique situation

Benefit: Clients can trust from an experienced advisory team with in-depth industry knowledge

Thorough Approach

- Disciplined discovery and planning process—through Envision®—outlines crucial aspects of clients' financial situation, focusing on key wealth goals
- **An individualized investment strategy** focused on risk management and asset allocation, has helped clients address financial goals and retain purchasing power
- Consistent oversight of client portfolios helps ensure the strategy is on track, manages risk, and identifies course corrections, as needed

Benefit: Clients feel more comfortable knowing they have an advisor helping them make sound decisions about all aspects of their wealth

Personalized Service

- A customized service strategy that allocates resources, communication, and access to clients based on their preferences and current situation
- Innovative technology allows us to paint a full picture of where clients are in their financial journey and provide them timely updates throughout the process
- **Taking an interest in clients' lives** creates a comfortable environment and can help build trust over the course of the relationship

Benefit: Clients experience the satisfaction that comes from a long-term caring working relationship