Help SECURE your Financial Future

Individual Investors

Many investors assume their advisor is required to do what is best for them, but the reality is often quite different. Does your advisor work for you or for commissions? Do they prioritize your bottom line or theirs? With **Conrad Siegel** *Investment Advisors, Inc.*, the answers are clear.

Conrad Siegel *Investment Advisors, Inc., a* wholly-owned subsidiary of **Conrad Siegel** *Actuaries* is an SEC-registered investment advisory firm with that fiduciary requirement to always do what is right for the client. As an independent investment advisor, we work on a fee-for-service basis. That means you enjoy complete transparency with no hidden costs. Our personal approach is the foundation of our ongoing relationships.

Why Choose Us?

- **Independence** – No exclusive contract with any financial institution
- **Fiduciary Responsibility** – Legally required to put our clients first
- **Fees** – Fee-only advisors, fully disclosed fees
- **Local Team** – Experience and expertise
- **Personal Management** – Ongoing relationships and customized advice
- **Investment Approach** – Flexible to meet your needs

Investment Advisory Services

Focusing on your goals and objectives, **Conrad Siegel** *Investment Advisors, Inc*. has the background and expertise needed to provide ongoing management on your IRA, trust account, or general investment account.

- **Investment Recommendations** – Develop and maintain a comprehensive and diversified investment portfolio based on your goals and risk tolerance
- **Monitoring and Reporting** – Quarterly newsletter and performance investment summaries for each underlying investment and portfolio as a whole
- **Personal Meetings** – Regular meetings to review goals, risk tolerance, asset allocation, and portfolio performance

Conrad Siegel
INVESTMENT ADVISORS

A Conrad Siegel Actuaries Company

Financial Planning Services

Conrad Siegel *Investment Advisors, Inc*. believes a comprehensive financial plan can enhance the quality of your life by reducing uncertainty about your future financial needs and resources. We will assess your current financial health and develop a realistic, comprehensive plan aimed at meeting your financial goals by addressing weaknesses and building on strengths.

Areas of analysis include:

- Retirement & Financial Independence
- Investments
- Risk Management
- College Savings
- Estate

GET STARTED

We believe that every portfolio can benefit from an independent review. That is why we are willing to offer you a complimentary financial consultation when you need it the most. For your **complimentary consultation**, please contact us.

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Individual Investors

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