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Preserve, Prosper and Perpetuate Family Wealth Despite Volatile Markets

The Spivak Financial Group

Of nearly 36,000 of the world's leading life insurance and financial services professionals, the names of Stuart J. Spivak, Mark T. Woodfield and Timothy J. Hague Jr. consistently show up among the most accomplished. Exemplary client service, the highest standards of ethics, professional knowledge and other achievements place the founder and two managing partners of The Spivak Financial Group in the topmost-performing categories of the prestigious Million Dollar Round Table.

Spivak Financial's clients – primarily those who are nearing retirement or already enjoying retirement – benefit from the combined experience of all three of the licensed and certified professionals. "It's unusual for a financial advisory practice to take a collaborative approach," says Spivak, a Registered Financial Consultant and Life Underwriter Training Council Fellow. "When clients choose to do business with us, they know they are selecting a team, not just an individual, to help them with their money."

With extensive, ongoing training and more than 45 years of collective experience in financial services, wealth management, investments, insurance and income planning, there are few issues SFG hasn't tackled. And perhaps just as importantly, team members bring a broad range of life experiences to address some of the most important and sensitive questions their clients will face during their lifetimes.

A truly independent Financial Advisory Firm, Spivak Financial breaks the mold of traditional practices. "We're not the right fit for someone who simply needs assistance buying and trading stocks in hopes of beating the market," says Hague. "Our ideal clients are those who desire a long-term, personal relationship with trusted advisors who place their clients' interest ahead of their own. Our concern goes beyond fiscal matters. We're often called on to help people with practical challenges such as location transition or dealing with changes brought about by age- and health-related issues."

Left to right: Mark T. Woodfield, Stuart J. Spivak, LUTCF, RFC® and Timothy J. Hague, Jr.

Using world-class strategies and working with the most respected investment and insurance providers, Spivak Financial takes a conservative approach to building and protecting wealth. "Because our clients want to Sleep Well at Night (SWAN), we emphasize implementing solutions that provide safety, guarantees and predictability when it comes to building a strong financial foundation for our clients," says Spivak. "We use a wide range of effective, time-tested strategies using Annuities, Life Insurance, Managed Accounts using low-cost ETFs and Bonds, as well as Alternative Investments to help our clients achieve their financial goals."

Spivak Financial has experienced impressive growth, doubling in size in the last few years while other practices were closing shop. Many of its clients have been with SFG for two decades, some are second-generation clients, and most were referred to Spivak Financial by family members and others. "When the markets are volatile, investors look for someone they can trust and who has a strong track record of success," says Woodfield. "Our retired clients didn't experience big losses in the aftermath of the 2008 economic downturn. We grew as worried families looked for a 'hands-on' alternative to the large, impersonal wirehouses."