Don’t Just Secure Your Future. Shape it.

VALLEY NATIONAL
FINANCIAL ADVISORS

Shaping Your Future

Retirement. Estate planning. Building your legacy. These aren't simply checkboxes on a to-do list. They represent the culmination of your hard work. You deserve a partner who recognizes the needs behind the numbers.

More than your financial advisor, we're your strongest advocate. We're your ally and champion. With this focus, we provide a personal touch to do more than simply secure your future.

We help you shape it.

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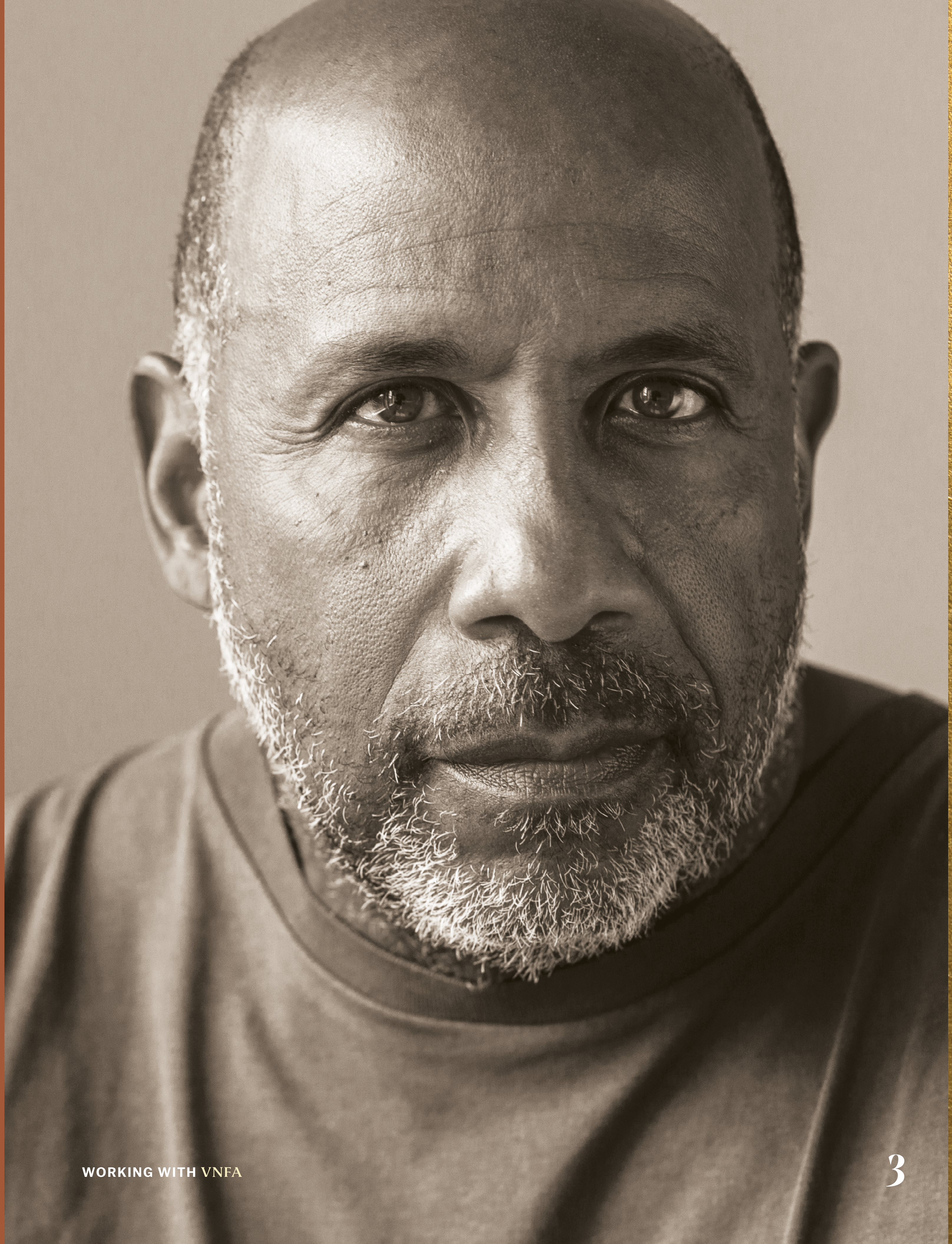
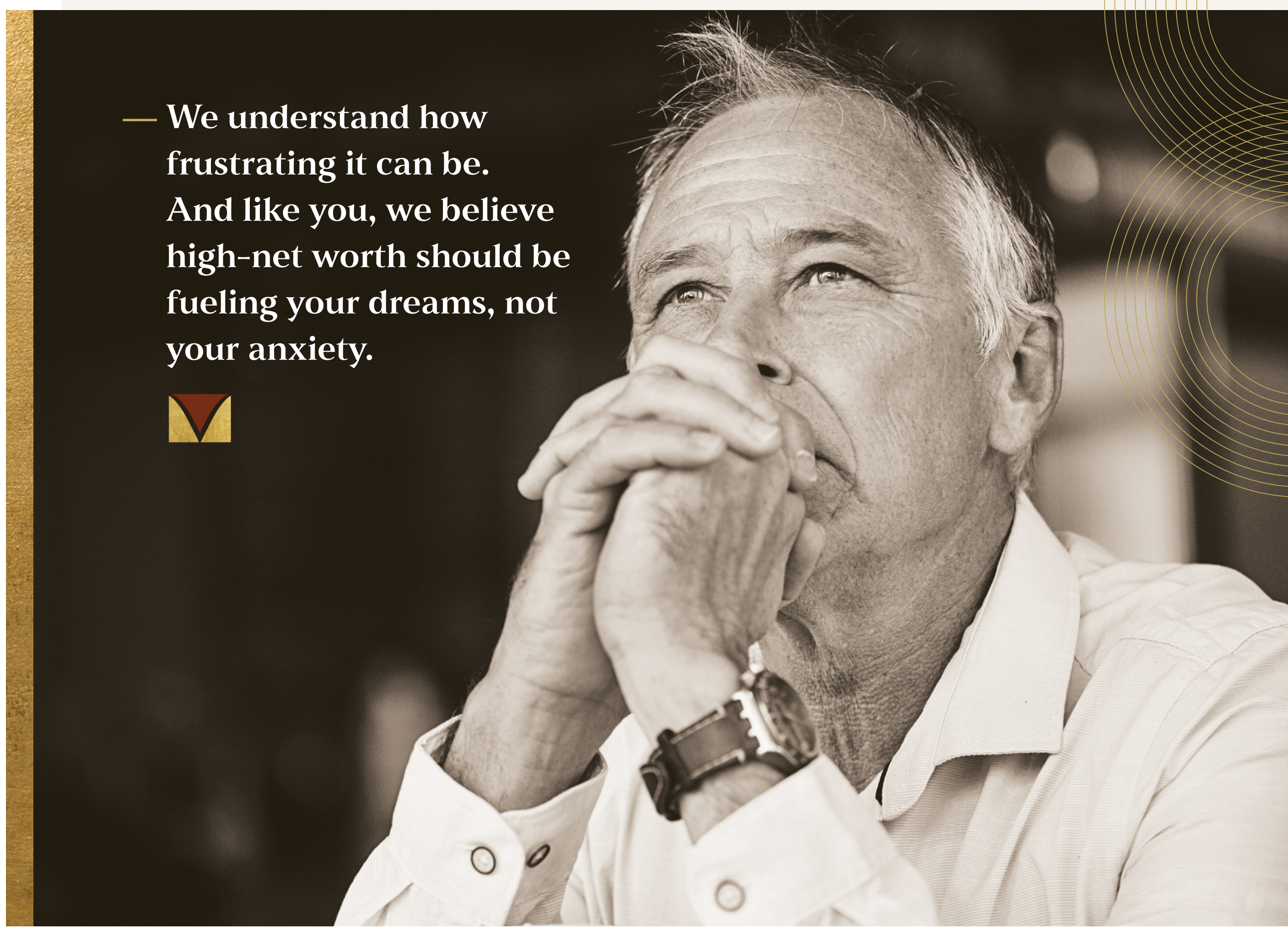


Navigating Difficult Decisions

The path to reaching your goals won't always be clear. Financial choices can result in both intended and unintended consequences, and how you react can significantly impact the journey.



— We understand how frustrating it can be. And like you, we believe high-net worth should be fueling your dreams, not your anxiety.

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The VNFA Client Experience

You've worked hard to get where you are. Here's how we help you go further.

01 Tell Us Your Story

It all starts with us getting to know you, your values, and your dreams. This paints a more complete financial picture and helps us make recommendations that take you further down the path.

02 Design Your Path

Together, we'll visualize the possibilities. Fully embracing what makes your personal circumstances unique, our team of analysts, accountants, and financial planning **professionals** will identify the best actions to address your needs and accomplish your goals.

03 Enjoy a Lasting Partnership

From cash flow, tax, investments, and risk to estate and retirement planning, we're with you every step of the way. No matter what obstacles you face, you can take comfort in knowing we've been there, ensuring security for you and your legacy.

04 Build Your Legacy

As financial seasons change, we'll review evolving needs, identify new opportunities as they arise, and even capitalize on advanced financial strategies like multi-generational wealth management and complex alternative investments.

The VNFA Difference

In today's dynamic financial landscape, the path to prosperity can seem daunting. Market volatility, evolving regulations, and life's unexpected twists can make managing your wealth feel overwhelming.

SINCE 1985

VN FA

- **Top U.S. Financial Advisor**
  Proudly recognized among the Financial Times Top 300 Financial Advisors in the U.S.*
- **$1.3 billion**
  Total assets under management as of 2026.
- **Since 1985**
  Our expertise is built on decades of experience guiding clients through every financial climate.
- **Featured Services**
  Our wealth management services integrate income tax planning, estate planning, retirement, and education planning.

Invest in the Strongest Bond

Whether you're a seasoned investor or relatively new to advanced wealth management strategies, establishing a personal connection with a trusted expert is vital to long-term success. Because it's not just about what your financial advisor knows—**it's about how much they genuinely care.**

> You need expertise and experience on a deeper level—one built on trust, shared values, and personalized guidance. As your local, independent partner, this is at the heart of what we do.

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Reframe Your Financial Picture

You don't have to take on complex decisions alone. You don't have to second-guess yourself, or brace for unintended consequences that threaten your financial freedom.

Instead of feeling overwhelmed, you can take the first step toward securing tomorrow while enjoying the legacy you're building today.

Schedule Your Consultation Today

Ready to get started? Reach out to start shaping your future.
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WDIY 88.1 FM

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Historical performance results for investment indices, benchmarks, and/or categories have been provided for general informational/comparison purposes only, and generally do not reflect the deduction of transaction and/or custodial charges, the deduction of an investment management fee, nor the impact of taxes, the incurrence of which would have the effect of decreasing historical performance results. It should not be assumed that your Valley National account holdings correspond directly to any comparative indices or categories. Please Also Note: (1) comparative benchmarks/indices may be more or less volatile than your Valley National accounts; and, (2) a description of each comparative benchmark/index is available upon request or at www.valleynationalgroup.com

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