



Financial Advisors of Delaware Valley

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### Personal Philosophy

***In business, and within our personal lives, the environment rarely remains constant. Therefore, to achieve our professional and personal goals we must develop a solid plan, take disciplined action, monitor our progress, and adapt as necessary.***

Through his experience as a financial professional who has earned the CERTIFIED FINANCIAL PLANNER™ designation, Mike assists his clients by assessing the client's situation, identifying critical goals and key obstacles to success, crafting financial strategies, and helping clients to form a plan to help grow and protect their wealth.

#### **Mike is able to help his employed and retired clients answer key questions such as:**

- Are my current investments consistent with my goals and risk tolerance?
- Can I accumulate sufficient funds to achieve my retirement goals?
- Can I accomplish college funding for my children or grandchildren?
- Would my loved ones have enough money to live on should I die or become disabled?
- Can I successfully become a more passive business owner by putting the right strategies and people into place to help achieve my business goals?
- Can I successfully transition ownership of my business to family, co-owners, or key employees on my desired timeline, while achieving a dependable income stream?

**He knows that getting to "Yes" for each of these questions is the result of disciplined action within a well-crafted and up-to-date financial plan.**

#### **Mike helps successful corporate, legal, and medical professionals to implement plans to help achieve their goals. To do so, he utilizes his highly unique background:**

- Executive at Frontgate catalog, responsible for product quality, availability, and customer satisfaction
- Supply chain management roles at IBM and consulting firm Kurt Salmon Associates
- Virginia Tech, B.S. Industrial & Systems Engineering
- Emory University, M.B.A.

Mike resides in Chadds Ford, Pennsylvania with his wife, Michelle, and two sons, Ryan and Luke. In his free time, he enjoys CrossFit workouts to stay in shape, coaching youth sports, spending time with family and friends at the beach, and golfing when time permits. Mike has shared his expertise through volunteering as a guest instructor at the University of Delaware's certificate in Financial Planning program, and as a Junior Achievement volunteer in middle school classrooms.

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