FORD & ASSOCIATES
WEALTH MANAGEMENT, LLC

# Keeping Your Goals in Sight

FINANCIAL PLANNING TO HELP YOU NAVIGATE THE ROAD AHEAD

**We are a goals-driven wealth management group that provides meaningful guidance and an elevated standard of care for individuals, families, and business owners locally and throughout the country.**

Our mission is to cultivate lifelong relationships with our clients, so they view us as the go-to resource for any financial opportunity or challenge. We leverage our energy, commitment, and vast resources to help clients gain confidence and pursue what matters most in their financial lives and businesses.

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*“When a client can retire confident in their ability to support themselves and their family, free to pursue their hobbies or passions, our mission is realized.”*

**We believe financial planning is much more than just creating a 'plan' - to be successful, it should be a collaborative, dynamic process that requires regular reviews and modifications.**

Our team takes pride in putting our minds and resources to work to help solve our clients' most significant financial challenges.

### PLANNING FOR INDIVIDUALS & FAMILIES:

Investment Management

Retirement Income Planning

Tax Management Strategies

Risk Management

Estate Planning

Education Funding

### PLANNING FOR BUSINESSES:

Employer-Sponsored Retirement Plans

Key Employee Retention

Succession Planning

# CORE PRINCIPLES

## What to expect when you work with us

We are committed to building relationships based on trust, transparency, and integrity. We believe in a holistic approach that considers all aspects of our clients' financial lives, including investments, education planning, retirement planning, tax strategies, and estate planning. Our team takes pride in putting our minds and resources to work to help solve the most significant financial challenges. Our commitment is defined by three core principles:

### COLLABORATIVE APPROACH

We take time to create a personalized financial plan designed to achieve clients' financial goals and their vision for the future. In-depth and genuine discovery helps us understand clients and their goals on a personal level to provide the perspective that comes from having a team that understands your wealth management needs.

### MEANINGFUL GUIDANCE

Our team, comprised of seasoned and credentialed professionals, aims to simplify, and ease decision-making by providing straightforward and practical advice. We deliver impartial guidance and tailor bespoke plans to align with the unique requirements and aspirations of each client under our care.

### ONGOING RELATIONSHIP

Our long-term trusted relationships have been built on our commitment to the highest levels of accessibility, responsiveness, and follow-through. We conduct ongoing reviews to help protect our clients' most valuable assets, their ability to save, and their income from unexpected events. We are positioned to provide our clients and their families with a lifetime of individualized advice and support.

## Ready to get started?

Regardless of your situation, risk tolerance, and goals, we're ready to help you prepare for the future. Reach out to us today by calling or conveniently connecting with us through our website. Your financial journey starts here.

CONTACT:

(703) 214-6646

www.fordwealthassociates.com

**Garrett Ford, CFP®, AIF®** | Managing Partner, Financial Advisor

Garrett is the founder and managing partner of Ford & Associates Wealth Management. He started his career during college as an intern at Merrill Lynch, where he decided to pursue a career in financial services. He joined Acacia as a Financial Advisor in 2001 before joining the Principal® Financial Network and establishing Ford & Associates in 2004. Garrett's greatest reward is being a resource for his clients and helping them navigate their financial goals.

BSAB Finance, with a concentration in Financial Services from East Carolina University

**Peter H. Webster, AIF®** | Managing Partner, Financial Advisor

Peter joined Ford & Associates in 2017, bringing over ten years of financial services and strategic planning experience to the team. Helping his parents plan for retirement inspired him to become a financial advisor, and he has since built his career establishing authentic, lasting relationships while helping his clients plan for their financial goals.

B.S. Business Administration, Northeastern University

**Hunter Looney, AIF®** | Financial Advisor

Hunter joined Ford & Associates in 2022 after starting his career as a Financial Advisor at Morgan Stanley in 2017, followed by time as a retirement plan representative at Northwestern Mutual. Helping clients design a financial plan with a roadmap to achieve future goals is the foundation of his planning process.

B.A. Information Technology, Furman University

**Christine Sylor** | Client Service and Operations Manager

Christine joined Ford & Associates in 2019 after starting her career as a special education elementary school teacher. As a Client Service and Operations Manager, Christine collaborates with the team to provide an excellent client experience.

Dual Undergraduate Degree in Elementary and Special Education, Towson University.

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## Let’s get started.

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