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PHILLIP JAMES
FINANCIAL



www.wealthandfinance-intl.com

Company: Phillip James Financial
Website: <http://phillipjamesfinancial.com>

Best Financial Planning Firm of the Year - Minnesota

Phillip James Financial: Investing with Purpose

While trust is the basis of any relationship, nowhere is it of greater importance than the one financial services firms build with their clients. With many years of experience in this domain, Phillip James Financial Co-Founders Phillip Christenson and James Sexton were familiar with the gaps that plagued the wealth management industry when they started the company in 2010. For when it came to garnering trust, education and engaging clients, most wealth management firms did precious little. And this is what the two endeavored to change - as the years were to show - with great success.

At Phillip James Financial, wealth management goes beyond the standard asset management to cover wealth administration (an array of intricate financial planning and management tools, aided by technology), wealth management (preparation of an investment plan and establishing portfolios according to client risk profile, income/liquidity requirements, asset allocation etc.), and wealth structuring (asset protection and tax strategies).

Forging Relations with Trust

An array of best practices have helped Phillip James Financial create a 360 degree, all

encompassing advisory service and ensured that its interactions with clients are relationship-driven. For instance, its fee-as-a-percentage of assets as opposed to a commission-based practice translates into considerable cost savings for its clients. This, and many more such features, has helped the company earn strong client referrals that have added to its fantastic growth story.

Co-Founder and Financial Advisor, Phillip Christenson, CFA explains, "We have built a strong alignment of interests by eliminating the product sales mentality, so that we can be on the same side of the table as our clients."

Looking Ahead

Christenson sums it up, "Looking ahead we believe the best is yet to come as continue to build long-term relationships that will last a lifetime."



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•INVESTING WITH PURPOSE•