



Strategic	Create long-term strategic plans focused on your unique needs
Wealth	Preserve and prudently grow your hard-earned wealth
Partners	Collaborate with other professionals to help you achieve your goals

FEATURED IN



**Financial Times'**  
**Top 300 Registered Investment Advisors (RIA)**

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**Financial Advisor Magazine**  
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MEMBER OF



**Financial Planning Association**



**The National Association of**  
**Personal Financial Advisors**

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## The Focus Partnership

### A Leading Partnership of Independent, Fiduciary Wealth Management Firms

In 2014, we joined Focus Financial Partners. Focus provides superior access to best practices, resources and continuity planning for its partner firms.

Focus partner firms maintain their entrepreneurial independence, while they benefit from the synergies, scale, economics and best practices of the market leader.

## FACTS

**Name:** Strategic Wealth Partners (SWP)

**Type of Firm:** Registered Investment Advisor

**Year Founded:** 2008

**Founders:** Neal Price & David Copeland

**Assets under Advisement (AUA):** \$2.6+ billion<sup>a</sup>

**Number of Clients:** 578<sup>a</sup>

**Typical Client Size:** \$2 million - \$20 million

**Compensation:** Fee-Only

**Number of Employees:** 30<sup>b</sup>

<sup>a</sup>As of 1/2/2018

<sup>b</sup>As of 5/10/2018

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“By nature, calling short-term market moves can be treacherous. It is more important to focus on what types of risks can be expected.”

*David Copeland | Principal & CIO*

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## SERVICE OFFERINGS

We develop, implement and continuously manage a long-term financial plan based on our client's needs. Planning is prioritized and implemented over time, and typically results in collaboration with the client's other advisors.

Planning areas may include:

- Investment advisory
- Retirement
- Education funding
- Taxes
- Estate
- Philanthropy
- Insurance

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“By learning everything we can about a client's situation, we are able to identify situations that need to be addressed and how they integrate with the client's financial plan. That's what makes the planning that we do extraordinarily valuable.”

*Neal Price | Principal*

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## Would you like our help on a story?

Our media contact can put you in touch with one of our professionals.

Gene Ullrich | [gullrich@tagteamglobal.com](mailto:gullrich@tagteamglobal.com) | 312-342-3119



**David Copeland, MBA** | Principal & Chief Investment Officer

**David offers expertise on story topics including:**

- Asset allocation
- Alternative/private investments

**Neal Price, CPA, MBA, CFA®, CFP®** | Principal

**Neal offers expertise on story topics including:**

- Planning issues for business owners
- Tax planning



**Moira Fahey-Ullrich, MBA** | Principal & Chief Solutions Officer

**Moira offers expertise on story topics including:**

- Compliance
- Technology & cybersecurity

**Ashley Bebeau, CFP®** | Wealth Advisor & Senior Financial Planner

**Ashley offers expertise on story topics including:**

- Retirement planning
- Divorce planning



**Tom Buhrmann, CIMA®, MBA | Wealth Advisor**

**Tom offers expertise on story topics including:**

- Behavioral finance
- Advising non-profits



**Andrew Denenberg, CFP® | Wealth Advisor & Retirement Plan Advisor**

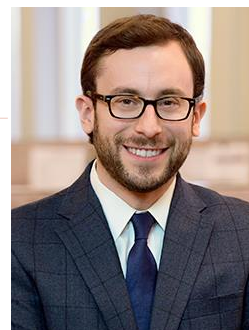
**Andrew offers expertise on story topics including:**

- Advising retirement plan sponsors and participants
- High net worth client needs

**Michael Karmin, CFA®, CFP® | Wealth Advisor**

**Michael offers expertise on story topics including:**

- Generational planning issues
- College/education planning



**Jill Kaz, CFP® | Financial Planner**

**Jill offers expertise on story topics including:**

- Transitioning into retirement
- Tax Planning in retirement

**Kathy Klein, CFP® | Wealth Advisor**

**Kathy offers expertise on story topics including:**

- Advising suddenly-single women
- Investment needs of foundations





**Marcie Nach, CFP®, MBA | Financial Planner**

**Marcie offers expertise on story topics including:**

- Senior care resources
- Long term care insurance
- Social Security

**William Perry, CFP®, CIMA® | Senior Wealth Advisor**

**William offers expertise on story topics including:**

- Investment manager selection and portfolio construction
- Advising non-profits



**Mark Weil | Wealth Advisor**

**Mark offers expertise on story topics including:**

- Managing investment risk
- Goal setting

## DOWNLOADS

### **Team Member Photos (high-resolution)**

**David Copeland**

**Neal Price**

**Moira Fahey-Ullrich**

**Ashley Bebeau**

**Tom Buhrmann**

**Andrew Denenberg**

**Michael Karmin**

**Jill Kaz**

**Kathy Klein**

**Marcie Nach**

**William Perry**

**Mark Weil**

### **Firm Logos (high-resolution)**

**White Background\_No Tagline**

**White Background\_Full**

**White Background\_10 Years of Service**

**Green Background\_No Tagline**

**Green Background\_Full**

**Green Background\_10 Years of Service**

## LINKS

**Bio – David Copeland**

**Bio - Neal Price**

**Bio – Moira Fahey-Ullrich**

**Bio – Ashley Bebeau**

**Bio – Andrew Denenberg**

**Bio – Michael Karmin**

**Bio – Jill Kaz**

**Bio – Kathy Klein**

**Bio – Marcie Nach**

**Bio – William Perry**

**Bio – Mark Weil**

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