



# VOYAGE PROGRAM

by Schneider Downs Wealth Management Advisors, LP





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At Schneider Downs Wealth Management Advisors, we understand that financial decisions can be complex throughout all stages of life, and the process of building wealth looks different for everyone. As a result, we've developed the Schneider Downs Wealth Management Voyage program. This program focuses on individuals and families who recognize the value of developing a financial plan as the foundation for a secure financial future. The Voyage program offers you assurance, knowing your financial future is overseen by a diverse group of experienced professionals with your best interests in mind.

## Voyage Program Services

We are committed to providing you financial advice and guidance throughout your lifetime. Our program offers a suite of financial planning services and resources for every step of your journey.

### Financial Planning Services

- Cash Flow Analysis
- Balance Sheet Review
- Debt Management
- Risk Management Analysis
- Retirement Planning
- Education Planning
- Estate Review
- Social Security Planning

### Investment Management

- Asset Allocation Analysis
- Risk Assessment
- Year-End Tax Loss Harvesting
- Annual Financial Checkup Meeting
- Quarterly Portfolio Reviews
- Investment Commentary
- Cash Management Service
- In-House Portfolio Management

### Additional Services Available Through Schneider Downs & Co. Affiliates\*

#### Estate Planning\*

- Last Will & Testament
- Financial Power of Attorney
- Health Care Power of Attorney
- Living Will

#### Tax Preparation\*

In addition to the services outlined above, the Voyage program provides direct access to a network of dedicated tax professionals and services, using innovative technology that reduces effort for you and optimizes your experience.

## Our Methodology

Our collaborative approach allows you to be involved in the process while having confidence in the expertise and services that we provide. Because we believe that working together to set and achieve goals is the best way to bring about success, we will work alongside you to develop a relationship as your trusted advisor and to prepare you for the financial decisions that life brings. As your financial needs change, our team will work with you to develop new strategies and incorporate more services into your plan to keep you on track.

## Why the Voyage Program?

As a Registered Investment Adviser, we take pride in our fiduciary role and are committed to working in your best interest. From selecting investment options to keeping you focused on your long-term financial goals, our collaborative approach to financial planning provides proactive solutions and investment options to help you stay on track.

As a client of the Voyage program, you will have access to our team of experienced professionals, including Certified Financial Planner™ Practitioners, Chartered

Financial Analysts®, Certified Public Accountants, Juris Doctorate degree holders, Accredited Investment Fiduciary™ Advisors, a Chartered Alternative Investment Analyst, a Certified Investment Management Analyst®, and licensed insurance agents.

## Ready to Get Started?

At the heart of our Voyage program is learning about your unique long-term financial goals. Let's get together and talk about you. Visit us at [www.sdwealthmanagement.com](http://www.sdwealthmanagement.com) or reach out directly to one of the contacts below.

### **James Moyer, CFP®, MBA**

412-697-5643

[jmoyer@schneiderdowns.com](mailto:jmoyer@schneiderdowns.com)

### **Michael J. Bucci, CIMA®**

412-697-5329

[mbucci@schneiderdowns.com](mailto:mbucci@schneiderdowns.com)





[www.sdwealthmanagement.com](http://www.sdwealthmanagement.com)  
Pittsburgh | Columbus | Washington, D.C.

*Material discussed is meant for informational purposes only, and it is not to be construed as investment, tax, or legal advice. Please note that individual situations can vary. Therefore, this information should be relied upon when coordinated with individual professional advice.*

*\* Tax and legacy planning services are offered through Business & Succession Planning Advisors, LLC ("BSPA"). Investment management services are provided through Schneider Downs Wealth Management Advisors, LP. Each service may require you to sign a separate engagement agreement that will outline the services to be provided and the respective fees. Please note BSPA is a separate legal entity and is not affiliated with Schneider Downs. Legal services provided by BSPA may not be available in every state due to licensing requirements.*

*\*\* Schneider Downs Voyage Program is a service offered by Schneider Downs Wealth Management Advisors, LP. Schneider Downs Wealth Management Advisors, LP (SDWMA) is a registered investor advisor with the U.S. Securities and Exchange Commission (SEC). SDWMA provides fee-based investment management services and financial planning services, along with fee-based retirement advisory and consulting services. Material discussed is meant for informational purposes only, and is not to be construed as investment, tax or legal advice. Please note that individual situations may vary. Therefore, this information should be relied upon when coordinated with individual professional advice. Registration with the SEC does not imply any level of skill or training.*