Spire Financial Advisors, LLC

AT A GLANCE
- Tax professionals
- Private ownership
- Comprehensive financial planning
- Over 20 years of combined industry experience
- Culture of service, not sales

YOUR TEAM
Through an ongoing consultative approach, our professionals will work with you to truly understand your financial goals.
- Samuel J. ("Skip") Angelo*, ChFC, CLU, QPA
- Thomas M. Angelo, CPA, CITP
- Joseph J. Carr, CPA, MBA, PSA
- John J. Crowe*
- Meryl L. Futey*
- Michele I. Lee*
- Judith L. Tutela*, CPA, RMA, PSA
- Robert J. Weir*, CPA, CFE, CFF

CONTACT US
100 Walnut Avenue, Suite 103
Clark, NJ 07066
(732) 381-8887

220 S. Orange Avenue, Suite 201
Livingston, NJ 07039
(973) 740-9100

info@spirefinancial.org

www.spirecpa.com

CONNECT WITH US:

OUR MISSION
Spire Financial, LLC offers tailored wealth management services to individuals, families, trusts and businesses. We listen closely to understand your financial situation, your dreams and aspirations, as well as your risk tolerance.

We provide comprehensive assistance to help preserve and manage your wealth. We believe a solid financial plan is integral to successful wealth management. You have meaningful goals and we can help you achieve them.

OUR SERVICES – METHOD 10®
We offer 10 key areas of wealth management services providing you with a holistic approach to financial planning. By addressing each area, we are able to help you develop and implement a comprehensive financial solution.

- Tax Planning: Are you utilizing strategies to reduce your federal & state taxes?
- Estate Planning: Do you have wills, powers of attorneys, and healthcare directives? When was the last time they were reviewed?
- Retirement Planning: Do you have enough money to retire and live the life you envision?
- Education Planning: Will you be able to help your children or grandchildren obtain a college education without them taking on excessive debt?
- Insurance Planning: What are your insurance needs? Do you have enough insurance to accomplish your goals after you have passed?

CREATING YOUR FINANCIAL PLAN
Developing a financial plan takes time. We provide a specialized analysis based on your personal circumstances and develop recommendations that can help you achieve financial security.

PUTTING YOUR FINANCIAL PLAN INTO ACTION
By working closely with your other advisors, we bring your financial plan to life. We understand that over time, your life circumstances and priorities change. We work with you to make any adjustments to ensure that you stay on track.