Life Strategies That Transcend Wealth

Harvest Financial Advisors

An executive wants to exercise a significant amount of incentive stock options, minimize taxes, and design an estate plan to ensure financial security for his adult children. He turns to Ohio-based Harvest Financial Advisors for guidance.

A medical group wants to establish a flexible and affordable retirement plan to attract and retain quality employees. Harvest Financial has the answer.

A family wants to protect its wealth and preserve it for the next generation. Harvest builds a conservative, low-volatility strategy.


L to R – Paul Burgdorf, Bruce Mason, Kelly Burgdorf, Marc Henn

"The wealth management experience we've created liberates our clients from worry and offers them clarity and opportunity."

– Marc Henn, CFP®, Founder/President

More than an investment firm, Harvest Financial Advisors helps clients achieve their personal financial goals in ways that go well beyond the accumulation of money. Using a proprietary planning process known as The Wealth Navigator™, Harvest Financial gains a deep understanding of each client before implementing a custom-tailored strategy that is adaptable as life circumstances change.

"We want people to feel confident that, although we are managing their assets, they are in control at all times," says Marc Henn, CFP®, founder and president. "The more we do for our clients, the more time they have for things that matter to them. The wealth management experience we've created liberates our clients from worry and offers them clarity and opportunity. It's a powerful combination, especially in this dynamic economic environment."

Personalized Wealth Management

With over $370 million in managed assets, Harvest Financial offers unbiased advice, often in consultation with other advisors such as attorneys and tax specialists. Many clients are successful professionals, retirees and affluent families with complex planning considerations. On the business side, Harvest Financial provides 401(k) services for professional practices, such as doctors' and attorneys' groups.

- WEALTH MANAGEMENT
- MULTI-FAMILY OFFICE
- CORPORATE EXECUTIVE SERVICES
- COMPREHENSIVE PLANNING
- BUSINESS 401(K) SOLUTIONS

Major news media including *The Wall Street Journal*, *Barron's*, *Time*, *Fox Business News* and *Financial Planning* have turned to the professionals at Harvest Financial for thought leadership on a variety of wealth-related topics. Respected throughout the industry, Harvest has enjoyed steady growth as a result of referrals from satisfied clients who have thrived, even during the Wall Street crisis of 2008-09.

"A client recently told me that he appreciated how I had taken care of him over the years, and he wanted to make sure I would continue to care for his family in the future," Henn says. "This is a common theme among our clients. The opportunity to help people prosper and to assist the next generation is an integral part of our approach. We are honored to work with so many wonderful clients, and there is always room at Harvest to work with more."

HARVEST FINANCIAL ADVISORS

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