Our Comprehensive Suite of Services

CASSADAY & COMPANY, INC
INDEPENDENT WEALTH MANAGEMENT
CONSOLIDATION · INTEGRATION · SIMPLIFICATION

At Cassaday & Company, Inc., our primary objective is to provide you with a comprehensive road map that takes all aspects of your financial situation and consolidates them into a centralized, integrated plan. Our unique approach, developed and refined over nearly four decades, is carefully and comprehensively coordinated on an ongoing basis by our dedicated, highly trained, and experienced team. Our services include the following:

Cassaday & Company, Inc.- Providing individuals and families with objective and impartial guidance since 1993. Contact us to find out how we can help you.

Investment Management

- Assessment of goals, time frames, & risk tolerance
- Asset allocation recommendations
- Portfolio design & construction
- Continuous portfolio monitoring, rebalancing, & maintenance
- In-house trading team
- Investment Policy Committee regularly meets to identify risks & opportunities to position portfolios accordingly

Planning for Retirement

- Patented portfolio withdrawal strategies (DIESEL®)
- Social Security & Medicare analyses
- Employee benefits & pension plan analyses
- Comprehensive retirement plan review

Financial Planning

- Goal analyses & recommendations
- Education planning: ownership strategies for college savings plans, 529 plan management, financial aid guidance
- Access to concierge medicine, life coaches, & special needs professionals

Client Education

- Virtual & in-person educational events
- Timely articles & commentary from our in-house subject matter experts
- Market insights from our research team
- Facilitation of family meetings to help your heirs understand your plans & documents
- Dedication to industry best practices & developments to ensure clients are always in the know and receiving excellent service

Advanced Strategies:
Life, Disability, Income & Asset Protection

- Insurance Audit: analysis of life, disability, long-term care, & annuity contracts
- Risk/ needs analyses, objective product recommendations, & implementation assistance for insurance & annuities
- Group 401(k) management & oversight
- Active involvement in insurance claim execution, contract reviews & management
- Long-Term care advocacy

Life Transition Services

- Private healthcare planning
- Continuing care community assessment
- Managing cognitive challenges
- Relocation planning: downsizing, decluttering, & estate sales
- Eldercare coordination

Estate Planning

- In-house estate plan reviews
- Strategies to minimize estate taxes
- Independent trustee referral solutions
- Legacy planning
- Estate administration
- Collaboration with your financial advisor, CPA, & other necessary professionals

Tax Management*

- Identification of tax efficiencies
- Collaboration with your tax professionals
- Tax loss harvesting
- Charitable giving strategies
- Accuracy verification of financial data, including cost basis of all previously held positions

Additional Benefits

- Complimentary client social events
- Annual shredding event
- Full-service IT support
- Secure online portal to memorialize important information
- Cassaday client portal app

Contact us for a complimentary second opinion about your current financial plan at (703) 506-8200.

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* We are not a Certified Public Accounting (CPA) firm and do not prepare tax returns; however, we have CPAs on staff, as well as a network of reliable professional relationships, & can help match you with the right tax professional for your needs.