

Ed Nichols

Service is the hallmark of both my professional and personal life. As a Financial Planner I want to help my clients reach their personal and business financial goals, and that they may experience the confidence that comes by providing them advice based on their needs. I strive to be someone they can trust as I lay out a working strategic plan that helps meet their needs and expectations.

The first step for any strong financial plan is listening to what my clients are saying; I hear what their goals are for their financial future and understand their comfort level when it comes to investing. My goal is to help them reach financial independence.

I stress to my clients the importance of establishing a long-term investment strategy before making individual investment decisions. By emphasizing the clients' personal goals, objectives and comfort level as the driving force behind the financial plan, my goal is to help clients have confidence in their investments through uncertain economic and financial conditions.

As a representative of The Fusion Advisor Network, I am in a position to help clients implement their financial plan. The securities and insurance licenses that I maintain allow me to have access to a wide selection of investment and insurance products. Once a plan is implemented my clients and I review it on a regular basis to assure that the plan remains suitable to their goals. I feel building a strong relationship of trust is important to the success of any financial plan.

I concentrate in retirement and estate planning, and I have taught retirement seminars at BOCES, Mt. St. Mary's University, Manhattanville College, Westchester Community College and Iona College. I graduated from the University of Virginia with a degree in Economics and have a marketing certificate from Cambridge. I am also a member of the International Association of Financial Planners.

I am past chairman of the Greenwich Young Life Committee, and a former church elder. I love sailing and skiing and live in Greenwich, Connecticut with my wife, Barbara. We have three grown children and four grandchildren. I love what I do, and as Warren Buffet said in his annual letter to investors (February 6, 2008), "I tap dance my way to work each day"