Confused with numerous types of investments?

❖

Not sure if your investments are performing well or are appropriate for your Risk Tolerance?

❖

Making a life change?

❖

Changing jobs?

❖

Want someone to help you build a plan & stay on track?

Trusted for Over 30 Years

Mary understands that navigating the vast array of financial products and services can be overwhelming, and choosing to work with an advisor is an important decision. At Stokes Wealth Solutions, you can be sure that you have a knowledgeable advisor who has been trusted with families' financial plans for over 30 years. Every client and their needs are unique, but Mary's process is a series of disciplined steps that will help us work together to identify your objectives, define your dreams, develop a plan to get you there, and review your progress on a regular basis.

OUR FINANCIAL PLANNING PROCESS:

- ❖ Identify Objectives
- ❖ Gather Information
- ❖ Analysis
- ❖ Recommendations
- ❖ Implementation
- ❖ Review

Mary works with you each step of the way to ensure you have the right plan in place to help meet your financial goals. Then she stays by your side to consistently evaluate your progress and make sure you are continuing in the right direction.

Helping You to Bring Your Financial Goals Within Reach!

stokes WEALTH SOLUTIONS

Investment, Retirement and Divorce Financial Planning

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PO Box 38011
Albany, NY 12203
518-690-0518
fax 518-690-0519
www.stokeswealthsolutions.com

Mary Stokes does not provide legal or tax advice. Please consult a qualified professional for legal or tax information that pertains to your specific situation.

Securities offered through Securities America, Inc., Member FINRA/SIPC. Advisory and financial planning services offered through Securities America Advisors, Inc., a SEC Registered Investment Advisory Firm, Mary E. Stokes, Representative. Stokes Wealth Solutions and the Securities America companies are unaffiliated.

Professional knowledge & experience to help you pursue your financial goals

Planning | Advice | Investing

stokes WEALTH SOLUTIONS

Investment, Retirement and Divorce Financial Planning

▼ Financial Planning ▼

More than just numbers....

It's about *your* dreams!

Mary Stokes, ChFC, CDFA™, CFP®

Certified Financial Planner™ Professional
Certified Divorce Financial Analyst™

COMPASSION ❖ EXPERIENCE ❖ INTEGRITY

Mary's passion is to lead others through the maze of financial planning and investment management. Entering the financial industry in 1982, Mary has spent over 30 years working with small businesses, families, and individuals. She works hard to build lasting relationships with each client to determine their needs and help them to understand their portfolio and goals.

Recognized by her peers in the Albany Association of Insurance and Financial Advisors with an award for high ethics, Mary was also the first woman to serve as President for this 300+ member organization. Mary is a member of the Financial Planning Association, Estate Planning Council of Northeastern NY, International Association of Certified Divorce Financial Divorce Analysts, and the Collaborative Divorce Association of the Capital District where she is also a past president. She has served on many local nonprofit boards.

Mary's #1 goal is to make sure that your experience with Stokes Wealth Solutions is a seamless one. Offering sound, independent advice, Mary guides her clients toward meeting their financial goals with a clear understanding of the process from start to finish.

Your Life, Your Dreams, Our Experience

What Is a CERTIFIED FINANCIAL PLANNER™ Professional?

A CERTIFIED FINANCIAL PLANNER™ Professional is a financial professional who meets the rigorous requirements of the CERTIFIED FINANCIAL PLANNER Board of Standards, including:

- ❖ Must hold a Bachelor's Degree from an accredited college or university
- ❖ Pass an extensive 10 hour exam
- ❖ Have at least 3 years of full time experience in Financial Planning
- ❖ Pass a background check
- ❖ Once appointed, a CFP® professional must meet continuing education requirements every other year in order to maintain the certification

A CFP® professional is qualified to develop and implement comprehensive, objective financial plans, helping you to establish your financial goals, identify areas of concern, and implement the plan to reach your goals.

PLANNING AREAS INCLUDE:

- ❖ **Pre and Post Retirement Planning & Savings**
- ❖ **Investment Management**
- ❖ **College Savings**
- ❖ **Protection Planning Including Life, Disability & Long Term Care Insurance**
- ❖ **Loss of a Spouse or Partner**

What Is a Certified Divorce Financial Analyst™?

Your marriage may be over, but you still have an entire life ahead of you. Often, financial expertise is missing from the divorce process. A CDFA™ can help you evaluate whether settlement offers are fair both short and long term. A CDFA™ can bring clarity to the financial issues in divorce and facilitate your understanding of your needs in this time of high emotion.

Using special divorce software, you can expect a clear, personalized report of the pros and cons of various settlements, as well as a clear understanding of:

- ❖ Budgeting & Cash Flow Needs
- ❖ Personal vs. Marital Property
- ❖ Valuing & Dividing Property, Pensions, Investments
- ❖ Spousal & Child Support
- ❖ Keeping or Selling the House
- ❖ Which Settlement May Work Best Long Term