

WEST FINANCIAL SERVICES

Financial Planning and Investment Management



From left to right: Susan Hamilton, Kimberly Cox, Dana Sippel, Glen Buco and Martin Shields

West Financial Services, Inc. provides expert financial planning and investment management guidance to help individuals, businesses, foundations, and associations reach their financial goals.

A commitment to quality, discipline, and personal services has made us a nationally recognized financial advisory firm. Our professionals have been included in *Washingtonian*, *Worth*, *Medical Economics*, and *Wealth Manager* magazines as top advisors in the industry.

Since our inception in 1982, West Financial Services has provided financial services on a fee-only basis, acting as a fiduciary for our clients. Every member of our firm fully embraces the

importance of this role and what it means to our clients. The decisions we make and the advice we provide are always in our client's best interest. Our disciplined and objective investment and financial planning process provides the trust and peace of mind valued so highly by individuals and organizations.

Our professionals have more than 175 years of combined wealth management experience. They are members of the National Association of Personal Financial Advisors (NAPFA) and hold many industry designations, including CERTIFIED FINANCIAL PLANNER™ (CFP®), Certified Public Accountant (CPA), Chartered Financial Analyst (CFA), and Certified Employee Benefits Specialist (CEBS).

1355 Beverly Road, Suite 250, McLean, Virginia 22101
703-847-2500 • www.westfinancial.com

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