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**PUGET SOUND FINANCIAL**

## Planning for Success

**Triad Financial Strategies** builds custom financial solutions with future-focused strategies.



**"P**lanning for your financial future can be overwhelming," says Tait Lane, president of Triad Financial Strategies. "Having our team dedicated to helping you on your financial journey can help you plan, feel confident in your decisions, and know your future is secure."

When looking for a financial advisory team, Lane recommends individuals consider both fit and strategy as decision-making factors. "Dealing with money is inherently emotional because every major life transition includes a financial element," he says. "A trustworthy advisor is one who truly understands your goals, has your best interests at heart, and offers the guidance to walk through all the facets of your financial life."

As a registered independent investment advisory firm, Triad Financial Strategies is purposefully and legally bound to put clients' interests first. Instead of proprietary products or cookie-cutter investment strategies, the firm offers guidance and custom-built portfolios based on clients' unique needs, comfort level, and lifestyle.

"We're an independent firm for a reason," says Lane. "While our partnerships give us access to global financial resources and bring the power of Wall Street to Main Street, our independence enables us to provide truly objective advice and treat our clients' success as if it were our own."

### Keys to Success

"The cornerstone of financial success is planning," explains Lane. "By looking first at the storyline you envision for yourself and your family, your financial advisory team can work backwards from your goals to create a custom financial blueprint."

At Triad Financial Strategies, planning is an ongoing, cooperative process between the client and wealth managers. "Our team acts as your personal CFO," says Lane. "Our clients' financial plans reflect their dreams and provide the actionable steps needed to achieve the financial future they desire."

After taking time to discover a client's goals, the Triad Financial Strategies team goes to work behind the scenes. "We look at the gap between where the client is and where they want to be, and we come back with a custom, comprehensive plan featuring our objective recommendations," Lane explains.

From there, clients work with their team to activate and monitor their financial strategy, but optimizing the plan is only part of the relationship. "We believe wholeheartedly in the power of ongoing relationships and client education," says Lane. To that end, the firm offers a weekly newsletter with market commentary and regular events, and provides each client with a secure website where they can consolidate personal finance and investment information and view their personal financial plan in real time. For questions and advice, the Triad Financial Strategies team is always available, reachable, and ready to assist.

"Our clients are the reason we come to work every day," says Lane. "Our greatest success is watching them achieve their dreams."



**Locations:**  
**Issaquah | Tacoma**  
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