

Alan R. Leist, Jr. and Strategic Financial Services, LLC Named to *Barron's* Top 100

Wednesday, September 10th, 2008



Utica N.Y. - Chief Executive Officer, Alan R. Leist, Jr., CFP, and Strategic Financial Services, Utica, New York, have been named to *Barron's* Top 100 Independent Financial Advisers list for the second consecutive year.

Leist is one of seven Independent Financial Advisers from New York State named to the list and the only adviser from Upstate New York. Leist was also listed in the 2007 ranking.

“This recognition by *Barron's* is a nice honor for our company and the talented team that we have built here at Strategic. More importantly, however, it serves to highlight just one of the many first-class businesses that call Upstate New York home. We are proud to be included among these outstanding firms,” said Leist.

Strategic is an independent financial advisory firm that manages over \$1 billion in assets for individuals, businesses, and not-for-profit organizations. Areas of expertise include asset management, financial and estate planning, and corporate retirement plans. Leist and Strategic Financial Services have also been named to *Barron's* Top 100 Financial Advisers three times.

Company headquarters are located at 114 Business Park Drive, Utica, New York with additional offices in Saratoga Springs, New York, and West Palm Beach, Florida. For more information call 315.724.1776 or visit www.investstrategic.com.

Services are provided through three Strategic companies: Alan R. Leist Planning Group, Inc., Strategic Investment Advisors, Inc. and Strategic Retirement Plans, Inc.; * Securities offered through Cadaret, Grant, and Co., Inc. - Member FINRA/SIPC; Strategic Investment Advisors, Inc. and Cadaret Grant are separate entities.

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Strategic Financial Services, LLC

Investment Management • Financial & Estate Planning • Corporate Retirement Plans

114 Business Park Drive, Utica, NY 13502
315.724.1776 / 800.937.4461
www.investstrategic.com

Additional offices:
Saratoga Springs, NY & West Palm Beach, FL