

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

Monday, August 31, 2009



**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 third consecutive year.

Leist is one of eleven 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 2006 and 2007 rankings.

“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 \$900 million 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](http://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

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