

Strategic's Leist Earns CFA Charter

Thursday, October 30th, 2008



Utica N.Y. - Strategic Financial Services, Utica, New York, is pleased to announce that Alan R. Leist III, CFA has successfully completed the third and final level of the Chartered Financial Analyst (CFA) program.

The CFA designation is globally recognized as the standard of professional excellence within the investment management industry. The program's three levels of exams must be completed over a minimum of three years. CFA exams are administered annually in more than 80 nations worldwide.

"Our mission at Strategic is to bring the highest levels of integrity, passion and competence to our work with clients. The CFA Program compliments this philosophy nicely and I am proud to have earned the charter," said Leist.

Leist joined Strategic Financial Services as Managing Director in September 2005. A native of New Hartford, New York, he is a 1995 graduate of Colgate University where he received a BA in Economics. He holds Series 7, 24, 55, and 63 licenses. Leist serves on the firm's investment committee and joins Judith Vicks Sweet, CFA and Scott C. McCartney, CFA as charterholders at the firm.

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.

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.