

Strategic's Leist to Present at *Barron's* Summit

Thursday, April 30th, 2009



Utica N.Y. - Alan R. Leist, Jr., CFP, Chief Executive Officer of Strategic Financial Services, will be among the presenters at the first annual *Top Independent Advisors Summit*. The *Barron's Winner's Circle* will host a gathering of the nation's pre-eminent independent advisors.

Members of the *Barron's Winner's Circle*: Top 100 Independent Advisors of 2008 will lead the event's sessions. The invitation-only summit held on May 6-8 will offer attendees the opportunity to meet and network with the leaders and opinion-shapers of the independent advisory profession.

Leist will lead the workshop on "Utilizing team capabilities that can strengthen your practice and optimize its efficiencies."

"In today's complex financial world, we feel that clients are best served by a team of specialists helping them to identify specific goals, and meeting with them regularly to review progress and results", 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 Advisors 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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