As Seen In
Bloomberg Businessweek, Money & Fortune
Building Wealth
Southeast Michigan

Team Approach to Serving Clients' Best Interests

"Our relationship-based approach is designed to help clients achieve financial peace of mind."

—Steven Bliss, co-founder of Acorn Wealth Advisors

Choosing the name for Acorn Wealth Advisors was an intentional process. "We wanted to represent our mission of helping clients achieve big dreams from small starts, just as the tiny acorn grows into a mighty oak," explains co-founder Steve Bliss.


Steven Bliss, CFP®, APMA®, co-founder

Built on core values such as trustworthiness, competence, service, integrity and professionalism, Acorn Wealth Advisors is comprised of six advisors with diverse experience and expertise, with the capacity to serve investors ranging from first-time homebuyers and small business owners to professionals and high net worth retirees.

"We match clients with the advisor who best suits their needs and life stage," says Bliss, "which is a great competitive advantage in terms of the client experience."

◆ THE IMPORTANCE OF INDEPENDENCE


Todd Tarantino, CFP®, co-founder

After 31 years of advising clients under the broker-dealer model, Bliss and co-founder Todd Tarantino recently made the bold decision to become a registered independent advisory firm.

"In the independent world, there are no commissions. We abide by the fiduciary standard of making decisions in the absolute best interest of the client, not just what is 'suitable' for the client," says Bliss.

Because the firm offers a flat fee for services, the advisors' recommendations are solely motivated by the goal of helping clients' assets grow.

"It's a win-win situation because the firm does well when the client prospers," says Bliss.

When recommending investments, the firm takes the client's true risk tolerance into careful consideration. "When the markets are up, everyone is an aggressive investor," observes Bliss, "but as soon as a 2008-2009 situation happens, people's true tolerance quickly comes to the surface."

To protect against such downside situations and help investors cope with volatile markets, the firm employs a pragmatic "winning by not losing" strategy.

◆ MORE THAN INVESTMENTS

Serving clients far beyond standard investment management, Acorn Wealth Advisors offers planning-focused services such as legacy planning, tax-efficient retirement distribution and guidance in helping clients define realistic financial goals.

"I co-founded Acorn Wealth Advisors in order to focus on providing successful individuals with personalized, unbiased, objective financial advice," adds Tarantino. "Whether it is real estate consulting or coordinating strategies with clients' tax and estate planning professionals, we are here to make a positive difference in our clients' lives. It's more than just managing money."

Acorn Wealth Advisors is located at 8305 S. Saginaw Street, Suite #2, in Grand Blanc, MI. For more information, call 810-953-4444 or visit acornwealthadvisors.com.

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