

Services Offered

FINANCIAL PLANNING

Prepares an Investment Policy Statement
Studies possible alternatives that could help you pursue your goals
Helps you determine realistic goals
Assists in preparing an estate plan for you
Check with you before end of the year to identify any last minute financial planning needs

INVESTMENTS

Prepares an asset allocation so you can pursue your desired rate of return for a given level of risk
Helps you incorporate strategies you may not be aware of in seeking to minimize risk, and maximize returns
Monitors your investments
Reviews your investments in your company
401k or 403b plans
Provides you with unbiased investment research
Provides you with personal investment analysis
Determines the risk level of your existing portfolio

TAXES

Helps you strive to reduce your taxes
Repositions investments in seeking to take full advantage of tax law provisions
Works with your tax and legal advisors to help you pursue your financial goals

PERSON TO PERSON

Monitors changes in your life and family situation
Proactively keeps in touch with you
Serves as a human glossary for financial terms such as Beta, P/E ratio, Sharpe ratio
Keeps you on track
Offers knowledgeable and unbiased advice for ideas you are considering
Is honest with you

Who Do We Help?

My clients are individuals and families, typically not institutions. Many clients of mine are what I refer to as the "Millionaire Next Door". These are people who have accumulated wealth in a variety of ways; ranging from professionals working and saving diligently over a lifetime to an entrepreneur selling a business. Others have received an inheritance or received money as a result of a gift or a change in marital status.

My typical client has enough capital to be financially independent, but not enough to be able to ignore the vagaries of the market. Many are planning for retirement, or well into retirement with the hope to transfer their wealth to the next generation. They are searching for an expert who can help customize a portfolio with the purpose of pursuing their desired return with an emphasis on risk management

How Can We Help?

Wealth Management

INSTITUTIONAL APPROACH TO INVESTING

If one is to examine how an Institution such as an Endowment or Foundation invests, it's certainly different than most individuals. Endowments typically invest across a broad spectrum of asset classes, outside of the traditional stock and bond portfolios. Asset classes that have lower or even negative correlation to stocks and bonds are referred to as Alternative Investments.

By combining Alternative Assets with a traditional Stock/Bond portfolio, an investor can strive to reduce volatility and provide more stable returns. I strive to bring an institutional approach with respect to wealth management to the individual investor.

Financial Planning

I help clients plan for their goals by using a financial planning process that is designed to incorporate various risk and market factors. This helps determine how likely it is that you will reach your financial goals.



Professional Profile

Prior to founding Snyder Asset Management, LLC., Philip worked as a financial advisor for a Fortune 500 company. He assisted clients with their comprehensive financial planning needs, ranging from cash flow analysis to retirement planning, as well as Wealth Management. He then worked as an Investment Consultant at a brokerage firm where he focused on recommending investment strategies to help clients pursue their financial goals.

Philip is a graduate of Hofstra University with a Bachelor of Arts in Business Management. He is a Chartered Financial Analyst Charter Holder and a member of the Baltimore CFA Society. He is FINRA Series 7 and 66 registered with LPL Financial.

Philip is an active volunteer at Baltimore Animal Rescue and Care Shelter.

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There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk.

Alternative investments may not be suitable for all investors and involve special risks such as leveraging the investment, potential adverse market forces, regulatory changes and potentially illiquidity. The strategies employed in the management of alternative investments may accelerate the velocity of potential losses. Securities offered through LPL Financial Member FINRA/SIPC. Financial Planning offered through LPL Financial, a registered investment advisor