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Saltmarsh
Financial Advisors, LLC

AN AFFILIATE OF SALTMARSH, CLEVELAND & GUND

Saltmarsh Financial Advisors Recognized as Top Wealth Advisory Firm by Accounting Today

PENSACOLA & TAMPA, FL (June 28, 2021) – [Saltmarsh Financial Advisors, LLC](#), affiliate of [Saltmarsh, Cleveland & Gund](#), one of the region’s leading CPA and consulting firms, is honored to be recognized by [Accounting Today](#) as a top firm by total assets under management (AUM). As an independent fiduciary, Saltmarsh Financial Advisors works closely with its clients to establish long-term relationships by providing personalized guidance on investing, retirement and estate planning while leveraging combined team expertise to manage tax-efficient portfolios.

Accounting Today’s yearly report recognizes the top 150 CPA financial planners by assets under management, which increased by 50% collectively over the past year. View the entire list of this year’s “Wealth Magnets” [here](#).



With the uncertainty of 2020, many firms increased client communications through a more virtual environment. Saltmarsh Financial Advisors hosted multiple virtual events about the stock market, investing and the impact of 2020 on financial planning, which reached clients and prospects throughout the United States.

“At Saltmarsh, we have an integrated, team-based approach focused on wealth management, tax, trust and estate expertise,” said Saltmarsh Financial Advisors, LLC’s managing director, [Christina Doss, AAMS®](#). “We have built strong relationships due to our conflict-free advice, and it has truly

been a win-win for our clients and the firm. As a result, over the past few years, we have experienced significant organic growth in referrals and assets under management.”

This recognition follows Christina’s recent feature in the ‘Holistic Talk Issue’ of [Advisors Magazine](#), which discussed the importance of a holistic financial approach to planning to achieve better results.

About Saltmarsh Financial Advisors, LLC

Saltmarsh Financial Advisors, LLC is an independent investment advisory firm focused on providing tax efficient, low-cost wealth management solutions based on our clients’ best interest. Our experienced team of fiduciaries has decades of industry experience in providing cash-flow based financial planning and industry leading state-of-the-art portfolio design with an investment philosophy based on Nobel

Prize recognized research. Our mission statement, “Achieving Success by Contributing to the Success of Others,” is core to our client approach. Saltmarsh Financial Advisors is an affiliate of Saltmarsh, Cleaveland & Gund, one of the largest CPA-led business advisory firms in the Southeastern U.S. For more information, please visit www.saltmarshfa.com or call (800) 477-7458.

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