
Sylvia L. Matteson, CFP™

Sylvia started as a Financial Planner in 1981, receiving her Certified Financial Planner (CFP) designation in 1984 from the College for Financial Planning, Denver, Colorado.

She earned her BS in Education from the State University of New York at Oswego. Sylvia was a Financial Planner for many years in New York. She moved to Tucson, in 1997 and worked as a Senior Financial Planner with a local financial planning firm before starting Financial Freedom Associates.

Sylvia is a Registered Investment Advisor and a member of the Financial Planning Association (FPA), the National Association for Female Executives, National Association of Professional Financial Advisors (NAPFA), the Social Investment Forum and Co-op America.

Bill Holliday

Bill is currently taking classes toward his CFP certification and training to become a comprehensive financial advisor.

He came to Tucson after serving in the Peace Corp in Nicaragua. In Nicaragua, Bill taught entrepreneurial business courses and worked with small businesses to improve their productivity and profits.

Bill earned his MS in Mechanical Engineering from Purdue University and his BS in ME from Lehigh University.

Please contact us to set up a free non-obligatory appointment

Financial Freedom Associates
a fee only financial planning firm

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Financial Freedom Associates

a fee only financial planning firm

comprehensive personal financial planning services

specializing in socially responsible investing and living



Services include:
investment review and management,
retirement planning, tax planning,
insurance analysis, estate planning,
debt reduction

www.ffafeeonly.com

Financial Freedom

*Associates is a comprehensive
fee only financial planning firm*

Fee Only

We do not accept any commissions or marketing fees so we can provide you with unbiased service without any hidden charges.



Excellence in Service

We are committed to tailoring our services to your particular situation. We provide:

- A holistic approach
- Individualized plans
- In-depth investment research
- Collaboration and teamwork
- Education to make informed decisions
- Active management of investments
- Exercising due diligence
- Proactive action plans
- Building long-term relationships
- Flexible scheduling
- Confidentiality

Comprehensive Financial Planning

Investment Management

In-depth analysis of your current holdings and we help you construct a diversified portfolio using a full range of investment products in keeping with your goals, objectives, risk tolerance, and time frame. Your portfolio is actively managed and regularly reviewed.

Retirement Planning

Explore retirement goals and objectives. Develop a plan that will provide adequate resources prior to and during retirement.

Estate Planning

Optimize wealth transfer and reduce tax liability.

Tax Planning and Projections

Utilize strategies to minimize your tax liability.

Insurance Analysis

Review and assess current insurance coverage and plan for future needs.

Debt Reduction

Analyze your debt and together work on a manageable plan to reduce your debt.

Education Planning

Project education expenses and outline strategies to best meet these needs.

Socially Responsible Investing and Living

Screening

Including or excluding securities and/or funds based on social and environmental criteria.
This does not mean sacrificing financial gains.

Shareholder Advocacy

Make a small investment in irresponsible companies in order to influence the direction of business.



Community Investments

Includes community-based financial institutions to support community development in the United States and developing countries.

Charitable Giving

We will help you to select ways of giving that will provide tax advantages and can provide an income.

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