
Sylvia L Matteson, CFP®

Sylvia started as a Financial Planner in 1981 and received her Certified Financial Planning (CFP) designation in 1984.

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 National Association of Professional Financial Advisors (NAPFA), Financial Planning Association (FPA), Social Investment Forum and Green America.

Bill Holliday, CFP®

Bill received his CFP designation in 2009 and is a member of NAPFA and FPA.

He started working as a Financial Planner with Financial Freedom Associates in 2004.

Bill is a founding board member of a micro-credit operation in Nogales, Sonora that provides small loans to people to start or grow small businesses.

Prior to moving to Tucson, he served in the Peace Corps in Nicaragua as a small business development volunteer.

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



Services include:

investment review and management
retirement planning
tax planning
insurance analysis
estate planning
debt reduction
education planning

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Financial Freedom

*Associates is a comprehensive
fee only financial planning firm*

FEE ONLY

A Fee Only planner is one who, in all circumstances, is compensated solely by the client, with neither the advisor nor any related party receiving compensation that is contingent on the purchase or sale of a financial product.



A Fee Only planner may not receive commissions, rebates, awards, finder's fees, bonuses or any form of compensation from others as a result of a client's implementation of the individual's planning recommendations.

Financial Freedom Associates is a fee only financial planning firm - so we can provide you with *unbiased* service without any hidden fees. You will know exactly what you are paying for our services.

Comprehensive Financial Planning

INVESTMENT MANAGEMENT

In-depth analysis of your current holdings and we help you construct a diversified portfolio 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

Utilize strategies to minimize your tax liability.

INSURANCE ANALYSIS

This process includes review and assessment of current insurance coverage and planning 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.

REAL ESTATE

We review your real estate investments and financing and make recommendations.

Socially Responsible Investing

SCREENING

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

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 income.

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