

Red  Oak
FINANCIAL GROUP



Big Enough to *Serve* You.
Small Enough to *Know* You.

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Company Overview

One of the most compelling aspects of our firm is that we work under one book of business, rather than each advisor soliciting individual clients. We have developed an advisory team with years of portfolio management and financial planning experience and pride ourselves on exemplary client service. Let us help you prepare for the future and take your financial situation to the next level.



The Red Oak Difference



We seek to provide unparalleled service to our clients in the way of response time, professionalism, reliability, and experience.

Our collaborative team approach at Red Oak Financial Group is one of the qualities that makes us compellingly different from many other financial advisory practices nationwide. This approach allows us to fulfill our unyielding pursuit of best practice industry knowledge, ethical financial creativity, and consummate service for our clients."

About Us

We are different from many wealth managers in that our focus is very much on retirement and legacy building. You may be considering retirement and need some help planning for your future. Or you may already be retired and want to make sure your money lasts. We can help!

If you have an ultra high net worth and are solely seeking to create a legacy for the next generations, we have a division prioritized for you and your family's unique set of goals.

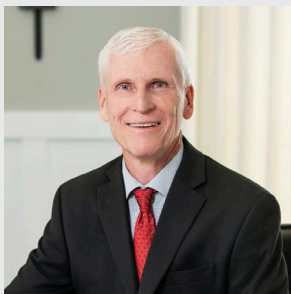
Our Advisory Team



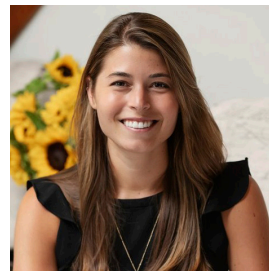
Christopher Compton
Principal



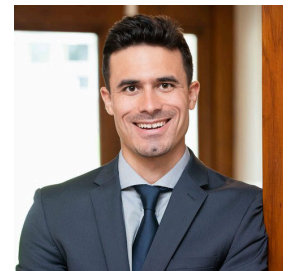
Robert L. Compton
Financial Advisor



Robert Gleiche
Director of Retirement
Development



Carli Stryker
Financial Planner



Aaron Tyburski
Portfolio Manager



David Feeley
Financial Advisor



Jon DeFeo
Financial Planner



Robert DiMarino
Financial Advisor

Who We Serve



“I’m Working”

Do you want nothing more than to leave the stress of work and bosses behind and enjoy relaxing and carefree days? Do you want to travel, or spend more time closer to home? Do you want to volunteer more or spend more time on your hobbies? We can help you navigate these questions with our financial planning team and prepare you for what comes next.

“I’m Retired”

Are you concerned you'll run out of money in retirement? Or maybe you want a second opinion to determine if your financial plan for retirement will keep you comfortable and secure. Our mission is to help you financially plan your retirement so your dreams become reality in your non-working years.

“I’m Building a Legacy”

People who are in the fortunate position of having enough assets to transcend generations need financial clarity on how to do so. From trusts to estate planning to allocating your assets correctly for the next generation, the important thing is to leave no stone unturned. Small mistakes in planning for the future can potentially cost a significant amount of dollars in probate fees, taxes, and portfolio returns. We can help you create the financial legacy you desire.

Financial Planning Approach

We are a comprehensive financial management firm providing services for clients at all stages of their financial life. The goal is to identify where you are trying to go, and then create a plan that strives to help you get there. As independent financial representatives we are able to offer personalized financial guidance to our clients.

We have been servicing investors in the Baltimore area since 1978, and believe in focusing on fewer, more intimate relationships and offering a more value-added service to our clients.

Creating a financial plan for our clients is much more of an "art" than a "science". We believe that a successful financial plan is based on a deep understanding of our client's goals and objectives. We can help you to define your financial and life goals based upon your resources, risk profile and lifestyle, and then outline a balanced and realistic financial plan to strive to meet those goals. We guide you through this process by helping you to understand how each financial decision affects your overall financial goals, and can also help you adapt your plan as life changes.



Our proprietary investment process is personalized to your individual strategy and vetted weekly by our Investment Committee. We prepare for your future with you, not for you.



Investment Management Approach:

- ✓ We are macroeconomic asset allocators and risk managers.
- ✓ We recognize the future is unknowable, and as such we diversify our client portfolios.
- ✓ We provide behavioral coaching in an effort to help yield clients optimal results across market cycles.

Core Investing Tenets:

Broad Diversification

As a starting point for all asset allocations, we seek to provide clients with the returns of the global stock and bond markets, in a risk-appropriate manner.

Low Cost

Our preference is to allocate to products that carry low expense ratios. (We want more of YOUR money to work for YOU.)

Value-Added Trading

We rebalance accounts periodically to maintain their target asset allocation and make macroeconomic-based trades as deemed necessary for optimal performance.

Frequently Asked Questions

Is a financial advisor worth it?

Financial advisors offer skilled professional advisory services related to personal finance and wealth management. Whether it is about your budget, savings, debt management, investment portfolio, retirement savings, tax optimization, estate planning, etc., a financial advisor with the right experience can help you with anything you need. A good financial planner can potentially help you accumulate wealth, reduce stress, save time, and safeguard your retirement. The key is finding an advisor you can trust.

What is a fiduciary?

A fiduciary is a financial professional who is obligated by law to operate in the best interest of their client(s) at all times.

What are your qualifications?

We have been in business for over 48 years and have seen nearly a half a century of market cycles. We are credentialed with CFP®s, ChFC®s, and WMCP®s. Most importantly, we have a team with years of experience and a commitment to service.

How will our relationship work?

We generally advise using a two-advisor personalized system-meaning two advisors will work with you directly. Behind the scenes, we have specialized professionals to help guide you through more specific situations, if they arise. Teamwork is what we pride ourselves on at Red Oak and leveraging all sources of knowledge on hand.

How do you get paid?

Most of our clients are invested in advisory accounts, which means we are paid a flat fee based on a percentage of assets under management. We attempt to maintain competitive pricing with top of the line service. We can offer some commission based products as well, such as annuities.

Does Red Oak offer accounting and legal advice?

We are not authorized to give tax and legal advice, however, we have an experienced network of professionals that we work closely with in order to capture your full financial picture.

Where can I learn more about Red Oak Financial Group?

redoak1978.com |  

A Message From Our Principal



On behalf of all of us at Red Oak Financial Group, I want to say thank you for taking interest in our firm.

We have come a long way since my dad started this great company in the late 1970's, and I feel like we are only just getting started. Throughout my career as a financial advisor, I have learned many things from family, employees, and clients alike. The most important of these is listening with intention and empathy. As we embark on the next phase of Red Oak Financial Group's life-cycle, we hope to continue to build long-lasting and rewarding relationships with clients and friends for years to come.

Sincerely,
Chris