Our Qualifications

Margreta Swanson (Margie)

has been a Financial Advisor since 1985. After earning an Ed.S. degree and working as a School Psychologist for four years, Margie became an Advisor with Offerman and Company, a Minneapolis-based investment firm. In 2003, Margie joined Securities America seeking a strong national securities firm that offered a broad range of diversified services that would help her clients pursue their goals.

Margie is a member of the Master Elite IRA Advisor Group with Ed Slott‡ (irahelp.com), which trains IRA Advisors twice a year in the complex retirement arena and affords members access to highly trained professionals who give expert advice on IRA, 401K and 403B issues.

Margie is a member of the Hanson McClain Network, which focuses on guiding workers in the Utility and elecommunications industries toward a secure retirement. She is also a member of the Charlottesville Chamber of Commerce and the Aging in Place Business Roundtable. In 2010, Margie graduated from the Chamber's Leadership Charlottesville program. Margie lives with her husband David, and her feline family in Albemarle County.

Wendy Heifetz

is Director of Business Development for MH Swanson & Associates. She began her career in the securities industry after graduating from Baruch College, City University of New York with a degree in Marketing/Management. Wendy started a successful business travelling throughout the country training stockbrokers and their managers for all their licensing exams.

‡ Ed Slott's Elite IRA Advisor Group™ is for investment services only. Ed Slott's endorsement does not extend to the financial planning or investment advisory services offered by the representative. Ed Slott's Elite IRA Advisor Group™ members pay a fee for the educational programs that allow them to be included in the Ed Slott's Elite IRA Advisor Group™. Membership does not guarantee investment success.

Our location and contact information

Maclin Building
408 East Market Street, Ste 202
Charlottesville, Virginia 22902
T: 434.979.4822
F: 434.963.7859

e-mail contact
MSwanson@mhswanson.com
WHeifetz@mhswanson.com
VSchmidt@mhswanson.com
MKelly@mhswanson.com

Please call us if you have any questions about our firm or the range of financial products and services we provide.

MH Swanson & ASSOCIATES
Independent Wealth Advisors

www.mhswanson.com

ED SLOTT'S MASTER ELITE IRA ADVISOR GROUP℠

MH Swanson & ASSOCIATES

Independent Wealth Advisors

Strength in Balance

Our Mission Statement

We are Financial Advisors who work as a team to broaden and deepen our knowledge base to ensure that our client's needs are well–served.

As an independent firm, we have no proprietary investments, so we strive to act in the best interests of you, our clients, based on your individual needs and risk tolerance. We provide our clients with high quality service and remain accessible when you have questions or concerns.

We are committed to maintaining the highest standards of integrity and professionalism in our relationship with you, our client. We endeavor to understand your financial situation and provide you with only the highest quality information, services, and products to help you align your goals with compatible investment strategies.

We believe in the philosophy of "Strength in Balance".

A Secure Future Doesn't Just Happen

MH Swanson & Associates is a full-service financial services firm committed to helping people pursue their long term financial goals. We believe that by helping you identify your goals and providing you with sound financial information, we can help you make solid financial decisions to work towards those goals.

At MH Swanson & Associates, we define success to be when we become a significant part of the lives of our clients and the communities we serve.

While developing a customized financial program, we will walk you through a step-by-step process designed to help you feel confident in your decisions.

Once your goals have been established, we customize appropriate financial strategies to suit your vision and objectives.

Services

- Retirement strategies
- Lifetime income planning
- Lifestyle preservation strategies
- Wealth management
- Investment management
- Customized holistic planning
- Socially responsible investments
- Insurance and Annuity products
- Customized Social Security planning

Why choose MH Swanson & Associates?

Today we live in a different world. Retirees are being required to assume more of the burden for their own retirement security. We work as a team with our clients to address the key risks they face and build strategies designed to lead to their successful retirement. Our client's retirement savings must withstand unpredictable market conditions, unexpected changes in their lifestyle as well as inflation.

It is critical to our client's long-term financial health that their resources outlast them and it is also central to our definition of a truly secure retirement. We strive to implement strategies that make your money last through retirement even when the cost of living increases.

- WE listen, we build relationships, we get to know YOU, and then we provide advice specific to YOUR needs.
- WE emphasize trust and integrity to foster a long term and mutually beneficial relationship with you.
- WE make our decisions based on the interests of our clients, without regard to compensation.
- MH Swanson's Wealth Management Team is solutions orientated; we don't just send monthly statements.
- MH Swanson's Wealth Management Team provides you with access to mutual funds and tax-efficient investments not normally available to individual investors.