Financial Therapist Network Listing

Professional Services	Wealth advisory and financial counseling
Practice Approach	We are a fiduciary that engages our clients for a fixed fee. We use discovery to understand what is important to a client's life, and what provides them meaning. By counseling clients to make better financial decisions, they improve their overall life satisfaction. Our engagement offers ongoing financial and tax planning, investment and estate distribution advice while meeting clients frequently. We aim to minimize negative surprises.
Client Focus	Individuals and couples with resources seeking a higher level of satisfaction in their financial and personal lives.
Typical Client Profile	Clients in transition, anticipating a transition, or at a point in life where the stakes are higher.
Licenses/Certifications/ Designations	Certified Financial Planner
Education	Chemical Engineering- Case Western Reserve University Master in Taxation- Villanova University Special certificate in Estate Planning- Villanova University
Fee Structure	Annual fixed fee only.
Years in Practice	30
Professional Association Affiliations	Financial Therapy Association, National Association of Personal Financial Advisors, Financial Planning Association, Collaborative Law Professionals of Southeastern Pennsylvania
Do you work *at a distance* such as with Skype?	Yes, audio and video meetings.
Research Interests	Couples communication around money issues. Difficulty in discussing money between generations.

Contact Information

Name **Jeff Metz**
Company RTD Financial Advisors
Center City Philadelphia
Bala Cynwyd and West Chester, PA
Cherry Hill, NJ

Phone number 215 557 3800
Email jmetz@rtdfinancial.com
Website: **www.rtdfinancial.com**

Personal Statement

I enjoy helping clients have a great life. My observation is that the highest degree of client success and life satisfaction results when people have an ongoing engagement with a financial advisor.

I create a safe environment for communication free of conflicts to promote supportive conversations. The kind of counsel I provide is intended to improve a client's financial decision making and if a couple, improve their decision making together.

The experience is enhanced with our emphasis on communication and regular meetings. This regularity builds a history of decision making that I can resource to provide guidance when clients arrive at critical life junctures.