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HUDSON VALLEY FINANCIAL

LIVE LIFE BY DESIGN

The Atrium Financial Group's core-values-driven team helps clients build confidence through clarity.

When William Newman, CFP®, CLU®, ChFC®, CASL®, Wealth Management Advisor, began his career with Northwestern Mutual in 1982, he already knew his approach to client relations would be in-depth and in accordance with core values that have been important to him his entire life.

Of course, The Atrium Financial Group believes in delivering clients with a comprehensive experience and is committed to providing only top-level risk management, wealth accumulation, and wealth preservation advice. But Newman stresses that he and everyone on his team knows that to do so, it's critical they get to know their clients on a deep, interpersonal level to ensure they truly understand what they want out of life and out of their wealth.

"I want to know that not only does my client want to retire at 55, but they want to retire at 55, play golf on Tuesdays, and volunteer for their favorite charity on Thursdays," he explains. "That they want to contribute to their grandchildren's educational funds and travel with their inner circle three times a year. Then, and only then, can I help create a plan to ensure the client achieves those goals. What we are providing is confidence through clarity and a life by design—not default."

PROFESSIONAL, DRIVEN TEAM

The Atrium Financial Group works primarily with affluent, sophisticated families who are more than capable, says Jay Mackey, CFP®, CLU®, ChFC®, CASL®, AEP®, Associate Wealth Management Advisor, of managing their own wealth but who value both their personal time and the firm's 65-plus years of combined experience. The team, which services nearly $500 million in assets, includes five CERTIFIED FINANCIAL PLANNER™ professionals, whom Mackey describes as tech-savvy, hungry to learn, and client-service oriented. The group's clients are also supported by a detail-oriented, credentialed, and passionate operations team who are there to help ensure proper execution of personal, professional, and financial goals.

The long-term continuity such a team offers—multigenerational family clients need not ever worry about being left in the lurch—is another added value to a relationship with the group. "Planning for business transitions, estate planning, and legacy planning are all strengths for us today and will continue to be far into the future with a team of advisors who already have solid relationships formed with our clients," he says.

Mackey adds that The Atrium Financial Group's success is further supported by the bench strength and resources provided by Northwestern Mutual. The company delivers innovative tools as well as an exemplary line of products, including a state-of-the-art asset management platform that allows team members to work more efficiently and productively and a host of world-class insurance services.

"All in all, we want our clients to enjoy their time with family and friends and partake in everything they are passionate about without worrying about the current status of their portfolio or their future finances," Newman concludes. "We can help our clients spend their lives living."

THE ATRIUM FINANCIAL GROUP

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