

At West Financial Services, we take a conservative approach to building and protecting our clients' wealth and prosperity through customized solutions, financial education, personal attention and honest communication.

[Investment Management](#)

[Financial Planning](#)

[Executive and Business Consulting](#)

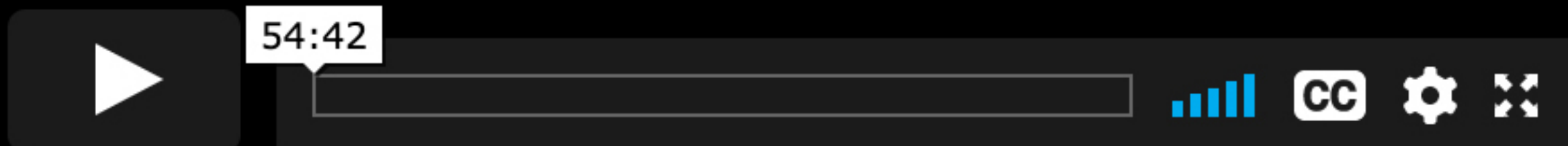
[Retirement Plan Consulting](#)

YOUR GOALS. OUR STRATEGY.

By prioritizing savings now, you can be better prepared to meet cash flow needs later. [Read on for some simple ideas and strategies to help up your savings game.»](#)

Space has always been the final frontier to adventurers and sci-fi enthusiasts, but here at West, we remain well grounded. [Find out why here.»](#)

West Financial Services presents "Under the Hood Part II: Making the Case for Mutual Funds and ETFs" webinar. West Financial Services offers you the opportunity to learn about the components of our “Core & Satellite” investment philosophy and dive deeper into the portfolio construction process.



Presenters: West Financial Services' [Glenn A. Robinson, CFA](#), [Dan Trosch, CFA](#), and [Tanya B. Carson](#).

A British tradition came to the DC area with the goal of raising money for a children’s charity. America’s British Reliability Run is a fun drive, not a race, on the back roads of Virginia, Maryland, and Pennsylvania.



West Financial Services was happy to be a sponsor and [Brian Horan](#) took the wheel of a Triumph TR6 to show support for this year’s highlighted organization ‘Our Military Kids.’

## THE SERVICES TO REACH ANY DESTINATION

### Investment Management

The West Financial Services investment approach stresses diversified portfolios tailored to each client’s individual circumstances. Our investment management goal is to maximize the return on each client’s portfolio while keeping within the individual’s risk tolerance, time horizon, tax status, and wealth objectives.



### Executive and Business Consulting

We believe in the power of collaboration. We work with, and often lead, a network of experts with the sole purpose of helping you and your family achieve wealth management goals. Having the analytical ability, in-house expertise, and industry relationships to build and implement strategic plans for our clients, distinguishes our firm from others.

### Financial Planning

Our professional team has substantial business and personal financial planning experience. This allows us to develop and implement financial plans across a broad range of topics, and in as much depth and detail as the client’s situation requires.

### Retirement Plan Consulting

West Financial Services uses our investment expertise and financial planning focus to help retirement plan sponsors and trustees meet their fiduciary obligations.

## THE VISION TO SEE YOU THERE

We are committed to improving the lives of our clients by providing exceptional financial services and solutions that earn trust and build lifetime relationships.

[Sign Up for Our Newsletter](#)



A Sandy Spring Bank Company

Serving McLean, Fairfax County and the Washington DC area  
 2010 Corporate Ridge Road, Suite 530, McLean, VA 22102  
 703-847-2500



Connect with us on LinkedIn

\*Not FDIC Insured \*No Bank Guarantee \*Not a Bank Deposit

\*Not Insured by Any Government Agency \*May Lose Value

© Copyright 2021 West Financial Services, Inc.

[Disclosures](#)





■ Our Services

Investment Management

Financial Planning

Executive and Business Consulting

Retirement Plan Consulting

West Financial Services offers financial planning, investment management and personal CFO services to individuals, families, businesses, foundations and associations. Our retirement plan consulting services focus on helping retirement plan sponsors and trustees meet their fiduciary obligations.

West Financial Services employs an integrated approach designed to provide our clients with comprehensive wealth management solutions. However, clients may use one type of service or the full breadth of our services.

- Investment Management
- Financial Planning
- Executive and Business Consulting
- Retirement Plan Consulting

We use a team approach when providing client services. This assures consistent, high level client care. As appropriate, we use external and internal experts who can assist with formulating customized solutions to a client’s complex financial concerns.

Always do right. This will gratify some people and astonish the rest.

- Mark Twain



A Sandy Spring Bank Company

Serving McLean, Fairfax County and the Washington DC area  
 2010 Corporate Ridge Road, Suite 530, McLean, VA 22102  
 703-847-2500



Connect with us on LinkedIn

\*Not FDIC Insured \*No Bank Guarantee \*Not a Bank Deposit

\*Not Insured by Any Government Agency \*May Lose Value

© Copyright 2021 West Financial Services, Inc.

Disclosures





# NEWS & INSIGHTS

## View Archive by Category

- Articles & Appearances
- Featured
- Financial Planning Focus
- Investment Management
- Special Release

## View Archive by Year

2021	+
2020	+
2019	+
2018	+
2017	+
2016	+

West Financial Services appreciates sharing our knowledge and perspective on Wealth Management topics so that individuals and families can achieve financial success.

[Sign Up For Our Newsletter](#)

## Financial Planning Focus Newsletter

Feb 2021

### Credit in the Straight World

Kristan Anderson, CEBS®, CFP®

Last month, the financial planning department did a presentation to clients on financial planning basics. If you missed the presentation, or are interested in any of the material that we discussed, please feel free to reach out to anyone in the planning department.

[Read more](#)

## Investment Management Letter

Jan 2021

### Investment Management - Fourth Quarter 2020

What is normal these days?

[Read more](#)

[View All Financial Planning Focus Newsletters](#)

[View All Investment Management Letters](#)

## Special Releases

**Brian J. Horan Earns Advanced Wealth Management Certification – Certified Private Wealth Advisor®**

**News Release: Certified Divorce Financial Analyst® Angela B. Baker Begins Serving Divorcing Couples in Northern Virginia**

[View All Special Releases](#)



A Sandy Spring Bank Company

Serving McLean, Fairfax County and the Washington DC area  
 2010 Corporate Ridge Road, Suite 530, McLean, VA 22102  
 703-847-2500



Connect with us on LinkedIn

\*Not FDIC Insured \*No Bank Guarantee \*Not a Bank Deposit

\*Not Insured by Any Government Agency \*May Lose Value

© Copyright 2021 West Financial Services, Inc.

[Disclosures](#)





# WEST FINANCIAL CLIENTS

Access your online account information by clicking the appropriate image below:



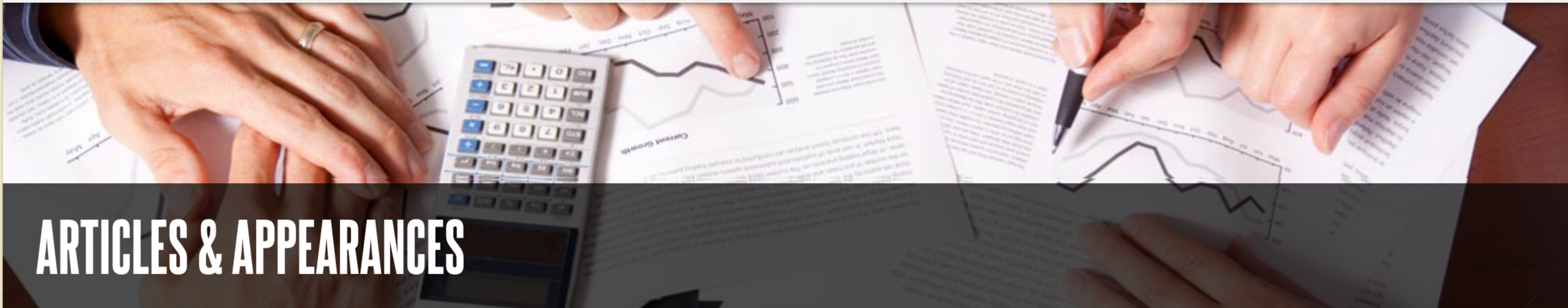
The Fidelity Investments, Charles Schwab & Co, Inc., NETXINVESTOR, and the Client Portal link are provided for your convenience and are not under the control of West Financial Services, Inc.

[Client Portal](#)

[Instructional Videos](#)

[Client Portal Mobile App](#)





# ARTICLES & APPEARANCES

## View Archive by Category

- Articles & Appearances
- Featured
- Financial Planning Focus
- Investment Management
- Special Release

## View Archive by Year

2021	+
2020	+
2019	+
2018	+
2017	+
2016	+

Mar  
2021

### BEST PLACES TO WORK FOR FINANCIAL ADVISERS

In March 2021, West Financial Services was named one of the **Best Places to Work for Financial Advisers** by *InvestmentNews* based on workplace policies and practices, and satisfaction surveys that measure the employee experience.

[Read more](#)

Jan  
2021

### Top Fee-Only Financial Advisers

**Glen Buco, Kim Cox, and Victoria Grossmann Henry** were recognized as **Top Fee-Only Financial Planners\*** by *Washingtonian* magazine in January 2021.

[Read more](#)

Nov  
2020

### Kim Cox Recognized in the Women in Wealth Issue of Fortune Magazine

**Kim Cox** appeared in the Women in Wealth\* special section of the November 2020 issue of *Fortune* magazine as a Five Star Wealth Manager winner.

[Read more](#)

Dec  
2019

### Top Fee-Only Financial Advisers

**Glen Buco, Kim Cox, and Victoria Grossmann Henry** were recognized as Top Fee-Only Financial Planners\* by *Washingtonian* magazine in December 2019.

[Read more](#)



A Sandy Spring Bank Company

Serving McLean, Fairfax County and the Washington DC area  
 2010 Corporate Ridge Road, Suite 530, McLean, VA 22102  
 703-847-2500



Connect with us on LinkedIn

\*Not FDIC Insured \*No Bank Guarantee \*Not a Bank Deposit  
 \*Not Insured by Any Government Agency \*May Lose Value

© Copyright 2021 West Financial Services, Inc.

Disclosures