Steel Financial

Home of the Bridging Process™

MEET THE STEEL FINANCIAL TEAM

Steel Financial Group CEO Johnathan Steel has brought together a team of specialists to ensure his clients receive efficient, expert and friendly financial planning advice and service.

Johnathan Steel, Financial Advisor (800.555.5556 | John@Steel.com)

As your Financial Advisor, Johnathan will coordinate the financial planning process for you. He will help you to identify your goals and he will work with you to implement a series of panoramic wealth strategies that will help you to realize your vision for the future through the Bridging Process.

David Drahne, Certified Financial Planner (800.555.5557 | Dave@Steel.com)

David joined the team in 2009 and brings an extensive financial background, having become a CFP in 2010. He also assists Michelle and Johnathan in assuring ongoing service for all Steel Bridge clients, including organizing our yearly events such as the annual Moorhouse Falls Charity Dinner in cooperation with the Harbor Food Bank. David, wife Lisa and son Adam are all enthusiastic anglers.

Michelle Conner, Client Services Manager (800.555.5558 | Michelle@Steel.com)

Michelle has been with the team since its foundation and ensures that our clients receive the best possible service. She is the first person you should call if you have any questions about your financial planning process. She will ensure that the appropriate member of our team responds to your query. Michelle and daughter Ashley both share a passion for hiking and have visited 20 of the 58 National Parks with future adventures planned.

Our Other Professional Resources

Because your financial situation is often complex, our team typically works directly with other professionals to design and implement the strategies that will help you to achieve your goals. We collaborate with a network of professionals who provide technical advice as required in the legal and estate management fields.

The professionals we most often work with include Ralph Walsmith, Attorney, and Sarah Clovis, CPA.

ABOUT
JOHNATHAN STEEL

With a keen interest in helping people achieve and maintain financial independence, Johnathan Steel founded Steel Financial Group in Lareston Massachusetts in 2004. A primary focus of Johnathan's clients, amongst other things, is that they want to know their needs will be met and any gaps bridged by a constantly elevating process-in-place designed to meet their ever-changing financial needs as they reach the apex of their career paths.

He has developed and refined the Bridging Process™ to address those client concerns - the critical f inancial events that occur as a client's life unfolds and their needs evolve.

Johnathan has a Series 65 license and maintains his Massachusetts Life and Health Insurance license. He became a Certified Financial Planner™ professional in 2011 and received his Retirement Income Certified Professional (RICP®) certification in 2014.

He was born and raised in Boston, Mass. Johnathan holds a Master of Business Administration degree from the Harvard Business University and a Bachelor of Arts degree in Economics from the Boston College. He has always had a deep fascination with both investment and economic forces, and that methodical and analytic nature is aligned with and informs his philosophy, planning strategies and process in the financial industry.

Personal Information

Johnathan and his wife of over 20 years, Laura, live in Lareston and enjoy the area and all its activities. Johnathan scuba diving, enjoys reading, swimming, Revolutionary-era history and hiking with his golden retriever Ben. He is an active member of his local Chamber of Commerce and is the current Secretary for the Daybreak Rotary club of Brookline. Johnathan's lasting interest in charity work led to his launch of the annual Moorhouse Falls Charity Dinner in cooperation with the Harbor Food Bank, which has raised over $250,000 in the last three years.

OUR PROCESS

We are powered by the Bridging Process™

Steel Financial is a wealth advisory firm for a variety of clients, many of whom are business owners or former business owners who have a wide range of needs and goals they aspire to reach. Many want a work-optional lfestyle and have specific bucket-list items they want to accomplish.

Johnathan Steel has developed and refined a process to address and unify all those needs, and it's called the Bridging Process. It focuses on where you are now, where you want to arrive, and builds the bridge, step by step, as it is crossed - dealing in real-time with your critical life events.

Discovery
- What do you want to accomplish?
- What's important to you?

Design
- How will we get you there?
- What services are the best fit for you?

Deployment
- Financial and legacy planning
- Product and risk assessment and fit
- Ongoing, continuous service
- Building a lasting relationship

Business has to enhance people's lives or it's simply not worth doing.

- Richard Branson, The Virgin Group

OUR PARTNERSHIP WITH YOU

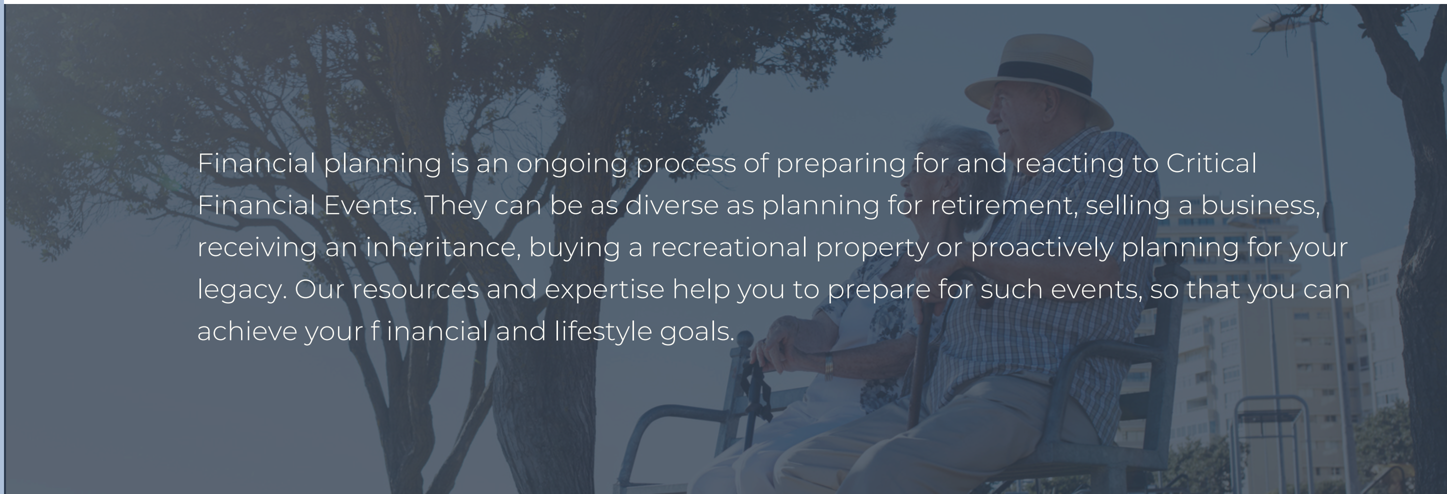
We provide comprehensive financial planning in the context of a long-term partnership with you. Through our experience we have learned it is important that everyone is clear on what to expect if we are to develop and maintain a successful working relationship – one where I can help you achieve your financial and lifestyle goals.

What You Can Expect

You can expect that we will consistently and responsibly perform all services related to the provision, review and ongoing monitoring of the financial planning solutions we implement on your behalf.

We Will Always

- Strive to acquire and maintain a thorough understanding of your financial goals.
- Update your current financial information on a regular basis.
- Carefully assess and monitor your investment risk and time-frame.
- Explain the implications of all recommended financial planning strategies and gladly answer any questions you may have.
- Update you as and when appropriate by email, mail and phone.
- Meet with you regularly to review your Personal Financial Organizer (PFO).
- Act as your primary Financial Advisor, coordinating the efforts of other related professionals as and when required.
- Treat you with utmost respect and professionalism



Financial planning is an ongoing process of preparing for and reacting to Critical Financial Events. They can be as diverse as planning for retirement, selling a business, receiving an inheritance, buying a recreational property or proactively planning for your legacy. Our resources and expertise help you to prepare for such events, so that you can achieve your f inancial and lifestyle goals.