



Zach Swaffer
Wealth Advisor

Trilogy Financial

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Trust, Transparency, Hard Work, and Reliability

Advisor Philosophy

As an independent financial advisor and Decision Coach I partner with my clients to help them make quantitatively better decisions over time based upon their unique priorities and timeframes. I emphasize education in all areas of the plan so that my clients understand the “why” behind each decision. It is my goal to create clarity and excitement around the planning process

I work on a referral basis only, choosing to build relationships where trust already exists. I strive to develop and strengthen long-term client relationships that are built on trust, transparency, education, and communication

Advisor Priorities

What I do for my clients on a daily and weekly basis:

1. Client Meetings – Meetings to strengthen my client’s plans
2. Client Service and Communication – Continued diligence keeps priorities in alignment
3. Planning and Research– Evaluating all available options to develop my client’s next best steps
4. Relationship Building – Building relationships with trusted professionals who can strengthen other areas of my client’s financial plan
5. Personal Development – Continuing to refine and build my knowledge of finance, markets, and the economy
6. Business Planning – Staying ahead of industry changes so I can be proactive, not reactive

Investment Philosophy

As I develop a plan for you, these pillars are at the forefront of my mind

1. Goal-Based Financial Planning – Every plan I design is unique to the priorities, timeframes, and individual needs of each client
2. Risk-Conscious Design – Investment recommendations are based upon your risk tolerance and timeframes
3. Transparency – The cost, holdings, and strategy will be clearly explained
4. Research Driven Construction – I utilize rule-based portfolios in my planning process to produce results over full market cycles

If you are interested in an initial meeting to decide if a consultative based planning relationship is best, please reach out to me at Zach.Swaffer@trilogyfs.com or 303-300-3323 ext 5125