

Team Sullivan

GPS System



“Advice for Life” is a process that you and our team, as your financial guides, will undertake together. By helping you articulate your aspirations, we are better able to understand where you want to be and develop a road map seeking to help you get there. Whatever your hopes for the future, our preferred way to pursue the vision of how you’ll spend the years ahead is to commit to a plan that can take you there. Our “GPS System” has helped other clients manage debt, better understand the financial decisions that support their situation, and improve family communication regarding money issues.



Goal Identification

Before making any recommendations, we meet to learn about you and your family. This enables us to assess your situation, current needs, risk tolerance and future goals.

Plan Development

After evaluating your unique situation, we develop a personal course designed to help you work toward your goals.

Solutions, Implementation & Monitoring

We partner with you to develop and put into action a customized plan that takes into consideration all areas of your financial life and helps you confidently pursue your goals.

80 Wolf Road, Suite 302
Albany, NY 12205

Office: (518) 479-4600
(518) 786-3300

www.albanyfinancial.com
j.sullivan@lpl.com



Securities and advisory services offered through LPL Financial, a registered investment advisor, member FINRA & SIPC