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Richard S. Koblick,
 Joshua J. Feller and
 Ian S. Horowitz

FELLER FINANCIAL SERVICES

Joshua J. Feller Helps Clients Prepare For The Unexpected

“Old school mentality with new school thought.”

That’s how Joshua J. Feller, co-founder and senior financial advisor with Feller Financial Services, describes his financial planning practice. The firm is registered with Voya Financial Advisors, an independent broker-dealer, where Feller is a member of the Chairman’s Circle, representing the top 3 percent of all Voya Advisors Registered Representatives which is determined by business growth milestones in assets under management.

For the last 12 years, Feller and co-founder Richard S. Koblick have been helping clients manage their wealth and plan for retirement using a seven-step process they developed that focuses on clients’ individual needs.

“It doesn’t matter whether you are a multimillionaire or just getting started. Every client receives a personalized plan because no one has the same financial DNA,” says Feller.

An important step in the process is having clients meet with their in-house estate planning attorney, Ian S. Horowitz. Ian Horowitz is not affiliated with Voya Financial Advisors. Neither Voya Financial Advisor nor its representatives offer tax or legal advice. Please consult with your tax and legal advisors regarding

“Many financial planners refer out this business, but we felt

it was more valuable to have someone in-house to answer any questions our clients might have,” Feller says.

Trying to manage your money can sometimes become overwhelming, but Feller Financial Services helps not only educate clients up front but also continues to educate them along the way with events and bi-annual checkups.

Feller Financial Services also works to build relationships with clients’ family to ensure everyone is included in the legacy planning. To that end, Feller and his team often attend clients’ weddings, retirement parties and other important milestones.

“A lot of advisors have no relationship with their clients’ children. We think that’s a big mistake,” says Feller. “We really try to get to know our clients from more than just a financial perspective.”

Because the economy is ever changing, Feller Financial Services helps clients prepare for the unexpected.

“We evaluate each client’s risk tolerance and build a personalized plan. By positioning their assets appropriately, we believe that, regardless of a turn in the economy, they will be financially prepared,” says Feller.

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Feller Financial Services is located at 1900 Glades Road, Ste. 354, Boca Raton. For more information, call 561-314-1800 or visit fellerfs.com.

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