



**For Immediate Release:** April 10, 2013

Contact: Donna Scherner  
(815) 545-0582

## **SYM Financial Advisors reaches \$1 billion in assets under management**

***Firm achieves milestone only reached  
by top 2% of registered investment advisors (RIA)***

WINONA LAKE, IND. (April 10, 2013) – SYM Financial Advisors, an independent investment advisory firm based in Winona Lake, Ind., has reached the milestone of \$1 billion in assets under management.

According to the Schwab 2010 RIA Benchmarking Study, only two percent of investment firms reach the level of \$1 billion in AUM. SYM, a small firm with 35 employees, ranks among the top RIAs in Indiana.

“It gives us great satisfaction to help our clients achieve their financial goals,” says SYM Senior Vice President Stephen Yeager. “We are excited to have reached this milestone, but more important to us, this achievement means that our clients are closer to meeting their goals through the uncommon results we deliver on their behalf.”

Established 45 years ago, SYM has built a reputation on being client-focused, building trust and rapport, taking ownership of the investment process, and embracing traditional values. “Other types of advisors have far more clients per advisor than what you will find when you work with SYM,” says Yeager. “We work on a much more personal level with our clients, and keeping our ratios low gives us the ability to give strong service and strong attention. That’s why people recommend us to their friends.”

SYM Financial Advisers is an independent investment advisory firm, specializing in wealth management, portfolio management and retirement plan services for high net worth clients such as business owners, physicians, professionals, and executives. The firm has offices in South Bend, Indianapolis, Winona Lake and Fort Wayne, Ind., and Midland, Mich. For more information, visit [www.sym.com](http://www.sym.com).

# # #