

As Seen In... Forbes, April 9, 2012

Partnering With Clients – and the Community

Vora Financial Is Making a Difference in Flagstaff and Throughout Arizona

You would expect any leading financial advisory firm to work hard for you, but would you expect it to work hard for your community too? If you're a client of Vora Financial Group, PLLC, or Vora Wealth Management, PLLC, the answer is a resounding "yes." As the founder of both companies, Dharmesh Vora, explains, improving the lives of neighbors in need through community-based philanthropy is part of the deal at Vora.

"By giving back to your community, you're improving the quality of life for residents within your city, your town – the place where you live and work," says Vora, who was recently named Philanthropist of the Year in Northern Arizona by the Association of Fundraising Professionals. "For me, that type of investment in human capital is invaluable."

Vora's passion for making his community a better place is a guiding force in his work with all clients. As a Registered Investment Advisor (RIA), Vora Wealth Management, PLLC puts the best interest of its clients first by focusing on wealth preservation through conservative growth strategies that aim to ensure financial stability for clients through retirement and beyond. As

active money managers, Vora and his team diligently monitor their clients' portfolios in order to adapt investments as market conditions change. The firm is fee-based as opposed to commission-based, which helps foster an atmosphere of teamwork with clients as well.

"We are unique among financial ad-

fee-based, we are able to work side-by-side with our clients instead of across the table."

A brilliant strategist with a down-to-earth approach, Vora has reverse-engineered the financial planning process to make it easy to understand and applicable to every client. He takes an active leadership role in designing and managing clients' portfolios alongside a team of in-house portfolio managers. And in keeping with the firm's promise of total transparency, each client has access to an innovative "green" Web-based portfolio management system, which allows clients to monitor their investments daily from anywhere in the world. With offices in Flagstaff, Scottsdale, Phoenix, Tucson, Sedona and Prescott, and clients spread throughout the country, this type of white-glove service exemplifies Vora's commitment to going above and beyond to exceed



Dharmesh Vora and the Vora Financial team

visors in many ways," says Vora. "As an RIA, we are registered with the Securities Regulators for the State of Arizona and use a third-party qualified custodian to hold our clients' assets. We don't work for a broker-dealer; our fiduciary responsibility is to our clients, so we view our clients as our employers. And since we are entirely

his clients' expectations.

"We serve our clients with both technology and the human touch," says Vora. "A lot of people manage money, but by getting to the heart of our clients' goals and needs, we are able to make a difference not only in their lives, but in the lives of their heirs as well."



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