



TAG Advisors welcomes boutique firm to expanding nationwide network

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Richmond, VA – TAG Advisors is pleased to announce that Blue Ridge Financial Planning has joined its growing nationwide network of 400 investment professionals.

Based in Fort Mill, SC, Blue Ridge Financial Planning has \$90 million in assets under advisement and is headed by industry veterans Joseph S. Silva and Monique Ryan. The Blue Ridge team specializes in comprehensive fee-based financial planning, individual and group retirement planning strategies, asset allocation, asset protection and risk management, investment management, small business benefits, business continuation and exit strategies, educational savings strategies, and tax planning.

TAG Advisors CEO Greg Raines said he and his team are eager to partner with Blue Ridge Financial Planning. “Their enthusiasm for what they do matches our own culture and commitment to help build thriving practices that position our advisors at the forefront of the industry and serve their clients well.”

According to Silva, “it was a very fast courtship on both sides.”

“The support that TAG provides really made it feel like the right home for us,” he said, noting that he and Ryan are excited about the expanded expertise, innovation and resources they will now be able to offer their clients through this new partnership.

“We also really like having other advisors we can reach out to and pick their brains, and who sit on the same side of the table with us to get things done. That kind of ‘supported independence’ is amazing,” Ryan added.

Both Silva and Ryan believe the leverage that TAG offers through its team-directed investment management service will be a game changer for their firm. They said the opportunities now available through their affiliation with TAG Invest, TAG Retire and TAG Protect are limitless.

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“Every team,” Silva said, “has been doing a terrific job helping us to really fine tune our clients’ investments and cater to their unique financial goals and aspirations.”

Another important factor that persuaded Silva and Ryan to join forces with TAG Advisors was its upfront, no-nonsense approach to onboarding their firm quickly and efficiently.

“We were asked what hurts and how they could make it better, and then every single thing worked in the exact timeframe that everybody said it would,” exclaimed Silva.

He gives TAG Advisors COO April Booth credit for keeping everything moving. “The goal is to make each of our partners a valued member of the TAG family, while providing them with the timely encouragement and tools they need to keep their individual practices evolving” she said.

“Our tagline is ‘Planning for Life’s Adventures,’” Silva concluded, adding that his clients are equally excited about all the possibilities that thinking outside the box can foster.

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