



TAG Advisors, Sechman Financial Services team up

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Harvard, MA – Family-owned Sechman Financial Services is teaming up with TAG Advisors to expand its business capabilities and strengthen its position in today’s rapidly evolving investment industry.

Camaraderie, compliance guidance and communication were the specific benefits that swayed owner Eric Sechman to join the ranks of Richmond, VA-based TAG Advisors, a leading national network of 400 financial professionals with revenues exceeding \$100 million.

“I’m amazed that with hundreds of advisors all over the place, TAG still manages to get everyone together every Wednesday for an hour to talk about regulatory updates, process improvements, vendor recommendations and what the market is doing,” Sechman noted. “TAG is the kind of forward-thinking firm I need and want to help me move my business into the future.”

Sechman added that TAG Advisors commitment to building strong relationships also reflects the way his family has operated their financial services business since its inception. His father retired at the end of 2022, and he officially took over the reins in January. “I’ve been with him in the firm since 2008, and we have always viewed our clients more as friends who are just like family. It’s important to me to maintain those close connections as I work with TAG to prepare the firm for what’s coming next.”

TAG Advisor CEO Greg Raines said their intent is to take advantage of the positive synergies resulting from this partnership.

“The collaborative approach TAG has refined maximizes productivity and enhances the many ways we support and assist our independent financial advisors,” he stated, “which is a win for them and their clients.”

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