

NEWS

For Immediate Release

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Stratus Wealth Advisors Ranked as a Top 16 Financial Advisory Firm in Silver Spring, Maryland by Expertise.com

Independent wealth management firm also adds new Financial Advisor to team, Amanda Monschein

SILVER SPRING, MD (March 15, 2021) – [Stratus Wealth Advisors](#), a comprehensive financial advisory and investment management firm that specializes in providing succession planning, financial planning, asset management, and business valuation services to independent business owners, was recently listed as one of the [Top 16 Financial Advisory firms in Silver Spring, Maryland](#) by Expertise.com.

Expertise.com scored 33 financial advisors in Silver Spring and narrowed it down to the top 16 based on more than 25 variables across five categories: availability, qualifications, reputation, experience, and professionalism. Expertise.com hired mystery “shoppers” to call the firms anonymously and evaluate them, and firms who responded quickly, answered questions thoroughly, communicated politely and professionally, and demonstrated expertise and experience scored higher. Stratus scored high in reputation, professionalism, responsiveness, friendliness, helpfulness, and attention to detail.

“We’re very proud to be recognized by Expertise.com as a top financial advisory firm in the Silver Spring area,” said Sam Brownell, CVA, CFA, Founder of Stratus Wealth Advisors. “We pride ourselves on our professionalism, helpfulness, responsiveness, and expertise, so it’s great to see our efforts recognized. We appreciate the mission of Expertise.com to connect people with the best local experts and are honored to be listed amongst these other top advisory firms as a resource in the Silver Spring community.”

Stratus Wealth Advisors comprises Stratus Capital Management, Stratus Legacy Planning, and Stratus Valuation. The Stratus family of companies was created to meet the multiple needs of

individuals, families, and business owners, ensuring a fair and appropriate business model for business valuation services, succession planning, financial planning, and asset management.

To see the full list of the Top 16 Financial Advisory firms in Silver Spring, Maryland, as well as Stratus' full listing, [please click here](#).

STRATUS WEALTH ADVISORS ADDS NEW FINANCIAL ADVISOR TO TEAM

Amanda Monschein joined Stratus Wealth Advisors in January 2022 as a Financial Advisor after working in the Financial Services industry for over a decade. She specializes in working with small business owners to analyze operations and provide advice on ways to streamline processes and procedures to prepare for growth and increase profitability. She also has over 20 years of advanced client service and project management experience in a variety of industries including television production, healthcare, nonprofit, education, finance, and senior services.

“I am thrilled to join Stratus Wealth Advisors, where I will be able to collaborate with clients and their other professional advisors to provide a high level of service that will help them meet their financial goals,” said Monschein.

Before joining Stratus, Monschein worked as a Daily Money Manager at Everyday Money Management, LLC, helping seniors, busy professionals, small business owners, and adults with disabilities manage finances, plan for the future, and reach their financial goals. In addition to financial planning, she helped with estate planning and execution, consolidation of assets, and identifying financial fraud.

“We are very excited to add Amanda to the Stratus team,” said Brownell. “Her experience in coordinating strategy among multiple stakeholders is an excellent fit with the services we provide to our clients.”

To learn more about Amanda Monschein and read her full bio, [please click here](#).

STRATUS TO SPONSOR AND EXHIBIT AT 2022 PRODEALER INDUSTRY SUMMIT

Stratus Wealth Advisors will sponsor the [2022 ProDealer Industry Summit](#), presented by [HBSDealer](#) and the [National Lumber and Building Material Dealers Association](#), taking place March 29th – April 2nd in Washington D.C.

In addition to their role as a Silver Sponsor, Stratus will also be exhibiting at the conference and providing informational resources for independent business owners in their booth, including printed succession planning letters and ownership transition options charts, as well as branded USB flash drives containing Stratus' [‘Essential Planning Kit for Independent Business Owners’](#). This kit, made up of continuity and succession planning tools for smart entrepreneurs, includes a Business Continuity Plan Checklist, an Activities and Services Analysis, a Hypothetical

Ownership Transition Timeline, an Ownership Transition Options Chart, an Initial Documents for Your Business Valuation Checklist, and a Buy-Sell Agreement Checklist.

LBM dealers, distributors, wholesalers, and manufacturers interested in attending the 2022 ProDealer Industry Summit can [register here](#). Those interested in learning more about other events that Stratus will be participating in this year, including in-person conferences, virtual webinars, and more, can do so by visiting the [‘Events’ page on the Stratus Wealth Advisors website](#).

ABOUT STRATUS WEALTH ADVISORS

Stratus Wealth Advisors is a comprehensive financial planning and investment management firm, founded by Sam Brownell, CVA, CFA, MBA, that specializes in providing succession planning, financial planning, asset management, and business valuation services to independent business owners. Brownell has been a financial professional since 2006 and formed Stratus Capital Management in July 2013 to provide goals-based financial planning and investment management to individuals, families, and independent business owners. As the firm grew, an increasing number of independent business owners sought Sam’s advice on their short and long-term planning needs, including valuation, tax strategy, business continuity planning, and succession planning. Today, Stratus Wealth Advisors comprises Stratus Capital Management, Stratus Legacy Planning, and Stratus Valuation. The Stratus family of companies was created to meet the multiple needs of business owner clients, ensuring a fair and appropriate business model for business valuation services, succession and financial planning, and asset management. For more information, visit www.StratusWealthAdvisors.com.

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