Nash & Associates

Matthew S. Trefethen, CRPS

Vice President - Financial Advisor

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Financial Planning Services:

- Financial Needs Analysis
- Retirement Planning
- Asset Allocation Review
- IRA & Roth Services
- Education Funding
- Asset & Income Protection

Qualifications:

19 Years Industry Experience

- Fiduciary Investment Advisor Representative
- Series 7,6,65 & 63 Securities Licensed

College for Financial Planning

- Chartered Retirement Plan Specialist - CRPS

Butler University

- B.A. Political Science & History with Honors
- Magna Cum-Laude

Mission Statement

"At Nash & Associates we strive to provide unbiased, sound - comprehensive financial solutions designed to take you through all the stages of your life. From creating a strong financial foundation, amassing wealth and protecting your assets, to avoiding common pitfalls and prospering in periods of economic downturn - we can help identify your needs and provide solutions to help you take action today wherever you are in life, whatever your needs, and whatever the economic climate."

Building your financial future...

In the face of our current economic realities, many are concerned where to turn for financial advice they can trust and depend on. On one hand it may seem best to go it alone or do nothing with your money. On the other hand, when you postpone necessary financial decisions, you lose opportunities to protect what you've earned and enrich the choices available to you in the future.

Every day I meet with individuals like you who have financial priorities today and dreams for tomorrow. While everyone's goals are unique, those who achieve their goals have two things in common: they know what they want, and they have a plan for how they are going to get there. This is where I come in...

As a financial advisor I help my clients achieve financial security for themselves and their loved ones by helping them clarify their goals and designing solutions based on their ideas, their dreams and their commitment to achieving them.

What I believe about financial security...

Financial security is the confidence that comes from having a plan and taking action today to provide for tomorrow.

It is important to invest wisely in accordance with a sound asset allocation strategy that is tailored to your individual circumstances and tolerance for risk.

Creating and implementing a written financial plan that is reviewed & updated annually to ensure you are on track to reach your goals & objectives.

It is important to protect yourself against the financial lose due to unexpected emergencies, job loss, a disabling illness, injury or death by utilizing commonsense affordable insurance.

It is important to have an estate plan, so wealth distributed exactly as intended - as an inheritance or as a legacy, either during one's lifetime or beyond.
