



COMPASS
WEALTH PARTNERS

CASE STUDIES AND SUCCESS STORIES



Proven Record of Success: Case Study - Beverly

HOW A SELF EMPLOYED ADVERTISING PROFESSIONAL SUPERCHARGED HER RETIREMENT DREAMS



Sold her business for
\$225,000.00



Tailor-made
investment solutions



Personalized
legacy plan

[Click here to read more details about this case study](#)



Proven Record of Success: Case Study – Amy and Frank

HOW A FAMILY WENT FROM COUNTLESS RESTLESS NIGHTS ABOUT MONEY TO HAVING THEIR RETIREMENT DREAMS BECOME A REALITY



Retirement dreams projected 4 to 5 years earlier than expected



Helped secure FREE grant money



Provided financial security and confidence

[Click here to read more details about this case study](#)

Proven Record of Success: Case Study – Sanjay and Alicia

HOW EASILY A COUPLE WENT FROM MAJOR FINANCIAL RISKS TO ACHIEVING THEIR DREAMS OF RETIREMENT



Turned retirement dreams into today's reality



Transformed financial risks into lifestyle opportunities



Optimized estate value and reduced taxation

[Click here to read more details about this case study](#)



Success Stories

“We have always received a warm welcome from everyone in the office. Steve and Isaac have handled our investments for many years. All changes, whether positive or negative, have been explained to us in layman terms so we always understand what is happening with our investments. Their rapport with our family and grandchildren is exemplary. We wouldn't hesitate to recommend Compass Wealth to anyone and everyone. Thanks for caring for us!”

– Don & Rosemary D.





Success Stories

“We have had Steve as our financial advisor for many years. He is easy going, professional, and makes both of us very comfortable regarding our portfolio. In our opinion, he has done a stellar job for us in our retirement planning in which we are now enjoying the benefits of his sound financial advice. We like to consider Steve as a friend as well as a Certified Financial Planner and we wish him nothing but the best and continued success in what is sometimes a difficult climate.”

– Barbara & Frank H.





Success Stories

“I have been associated with Steve Musial for my financial planning needs for approximately 25 years and have always found his advice and handling of my account to be satisfying, comforting and rewarding. I am retired now & live in Florida and appreciate the extra income I receive due to his excellent advice and guidance. It has been so nice knowing that his son Isaac has joined him, I so enjoy his enthusiasm for the business. I highly recommend Compass Wealth Partners. I trust them.”

– Valerie C.





Success Stories

“Working with Compass Wealth Partners has been wonderful! I have worked with both Stephen and Isaac and both are very attentive, are able to explain complex financial matters in clear language and provide great overall customer service. In addition to being treated very well, my investments are doing well too. I would most definitely recommend them to someone looking for excellent Financial Advisors!”

– Elaine F.





Success Stories

“I found Isaac very easy to talk to. He explained things in a way that made sense and was easy to understand. I have found his suggestions helpful and look forward to seeing him again in the near future.”

– Carol C.





Success Stories

“Compass Wealth Partners have been providing our family with financial services for more than 15 years. Their team has always been very helpful at explaining our options. They always answer all of our questions and concerns to ensure we are satisfied and comfortable with our investment choices. We truly appreciate all the advice and help they give us! We would, without a doubt, recommend them to our family and friends.”

– Eric & Jeanette S.





Success Stories

“I have been a client of Compass Wealth Partners for over 15 years. They have a great work ethic and are willing to go that extra mile to give advice and help. I trust them implicitly and would not hesitate to recommend their services to my family and friends.”

- Zoe M.





Success Stories

“Have always had a very good experience with Steve and his group. They always take the time to explain what's going on and provide valuable feedback on our investments. They are very good at making themselves available to answer any and all questions. They are always stressing patience when the market is volatile. Lots of wealth and knowledge. Thank you.”

– Steve & Grace P.





Success Stories

“The professionalism has always been amazing. Your commitment in better serving your client's has always been noticeable. Have been very satisfied in your financial team. Thank you.”

. Lori & Randy S.





Success Stories

“Absolutely Fantastic!!! Thank you to everyone at Compass Wealth Partners! Extremely knowledgeable & professional; listened to needs, courteous staff, responded extremely quickly to correspondence; excellent customer service.”

– Sharon J.





Success Stories

“Compass Wealth Partners have always been a great experience! A team that has always been available to answer my questions and offer helpful advice when dealing with my wife and I’s investments. I would highly recommend them!”

– Jasen C.





Success Stories

“We have been clients of Compass Wealth Partners since 2014. Our eldest son graduated from high school in 2015, so Isaac helped us organize our family RESP. We have 2 sons who are 5 years apart in age. Isaac always responds quickly and helps us get the job done in a timely fashion. This has made our life a lot easier having his expertise and assistance. Thanks Isaac.”

– Katherine D.





Success Stories

“I have complete trust in Compass Wealth Partners and know that my investments are in good hands. They always answer any questions I have and complete my requests in an extremely timely manner. I would definitely recommend their services!”

– Katelyn B.





Success Stories

“We have been working with Steve for many years and have always been satisfied with what he has done for us. Now that Isaac has joined the company we are double blessed. They deal with any questions or problems we might have. Nothing seems to be too much.”

– Randy & Rita L.





Success Stories

“We have been dealing with Compass Wealth Partners for over 10 years. They are very friendly easy to talk to concerning your financial needs for the future. I have always done well with them and I would never have anyone else handle my financial needs for the future. I have referred several people and they all have been happy with the work that they do for them. They go over everything thoroughly with you at the beginning and ask you to come in once a year to discuss your accounts.”

– Kristal P.





Success Stories

“Absolutely fabulous! Friendly, helpful - they actually treat me like a person, with individual needs and goals. They respond to my emails, and are happy to answer any questions I might have. I would absolutely recommend them to anyone.”

– Lori R.





Success Stories

“Great services provided. Friendly, knowledgeable and they take the time to explain your financial options.”

– *Tony F.*





Success Stories

“I have always had a very good experience with both Steve and Isaac they take time to make sure I understand everything before I leave the office.”

– Rita K.





Get Started Supercharging Your Wealth Today

Are you action oriented and ready to take control of your financial future but not sure how to take the steps to get there? We'd love to chat with you to see how else we can further help you.

For your FREE Wealth Assessment, [CLICK HERE](#).

OR

Contact us to get started:

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