

# The Suit Magazine

## Staying on Track for Life

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By Arthur Vining

People today are living longer. According to the National Institute on Aging, the number of Americans age 65 or older is expected to double in the next 25 years. And they are increasingly needing professional help in managing their retirement options. This is the area in which Tony D'Amico excels, and he is passionate about helping families with their financial decisions. As CEO of The Fidato Group, D'Amico has over 13 years of financial services experience, and is an investment advisor with fiduciary duties.

The Fidato Group has designed a specific method for organizing a client's finances to quickly ascertain where a client is currently and where they should go in the future. "We actually have five phases to our financial planning process, which includes whether people are saving enough, and making sure that they have enough investment risk – but not too much," noted D'Amico.

The company's diverse and holistic planning process covers the concerns of most clients. Requests for retirement and estate-planning are very common, but the Fidato Group also covers items such as stock option management. They seek to customize plans to suit each client's unique situation. Clients with specialized financial planning needs benefit greatly from the company's ability to tailor solutions specifically for unique circumstances.

The firm's financial planning process covers an array of areas. "Risk protection, estate-planning, tax efficiency – our financial forecasting process covers the gamut, including stock option management and coming up with a distribution plan. The way we make sure plans stay on track is that we do have a financial planning process that we follow. It is sequential, but we keep it organic enough so that it's customized to someone's specific circumstances," explained D'Amico.

What sets D'Amico apart from other financial advisors is his genuine care for his clients. He will often take time from his busy schedule to volunteer to help those overcoming physical and medical complications. D'Amico told The Suit, "We focus on the things that are going to make the biggest impact on their financial security first and progress in that order of priority."

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