Meet Chris Vassallo

Hi, my name is Chris Vassallo. I'd like to share a bit about myself, my family, and my business.

I live in Southwest Center City Philadelphia with my wife, our son, and our dog. I enjoy family time, music, the outdoors, art, reading, and cooking. I am passionate about my family and passionate about the work my team and I do at RTD to help our clients understand their finances and gain clarity about their future. We want to partner with more individuals, families, and organizations who will benefit from the RTD experience. Our goal is expanding our reach and helping more people.

Check out my Linkedin page to learn more about me.

PROFESSIONAL DESIGNATIONS & MEMBERSHIPS

CERTIFIED FINANCIAL PLANNER™ Professional
Financial Planning Association
National Association of Personal Financial Advisors
Estate and Financial Planning Council of Southern New Jersey
Temple University Teaching Award for Excellence in the Classroom

Why RTD?

- **We are fiduciaries.** We take a moral, ethical, and legal oath to always act in clients' best interests.
- **No surprises**. Our fees are a fixed fee for service; this helps eliminate conflicts of interests.
- **We're your partner for success**. We are significantly more than just a money manager. We partner with our clients to develop, implement, and monitor plans, track their progress, and understand the impact of various changes and decisions.
- **We know how to listen**. We take the time to learn about our clients' lives' before we learn about their money. Simply put, the questions we ask our clients and the counseling we provide – on matters that go far beyond the dollars and cents – brings tremendous value.

Offerings

Clients who partner with RTD are people who want, need, and value professional advice when it comes to their finances, planning, and wealth strategies. Clients usually align with one, and sometimes several, of the following services:

Personal Wealth Management: We help individuals, families, and business owners navigate financial decisions, developing an evolving plan focused on their unique needs and desires.

Employer Retirement Plan Solutions: We help business owners and executives to design and manage effective retirement programs.

Nonprofit Investment Management: We help boards and finance committees develop and manage high-impact investment reserve programs aligned with the organization's mission.

Trust Investment Management: We help individual and corporate trustees develop and manage investment strategies to meet the diverse needs of beneficiaries.

Check out RTD's website and LinkedIn page to learn more!

Awards & *Accolades*

RTD Financial is honored to be recognized year over year for our work.

FT 300 Ranking June 2019

Since 2019

Since 2019

Since 2019

RTD Financial's Firm Designations