

VIRGINIA FINANCIAL

“WHAT DOES FREEDOM MEAN TO YOU?”

THE FINANCIAL ADVISORS OF **FREEDOM STREET PARTNERS** ASK THE RIGHT QUESTIONS, GUIDING CLIENTS TO A DEEPER UNDERSTANDING OF LIFE'S POSSIBILITIES.



(l-r) Reed Sloat, Partner; Scott Danner, CEO; and Andrew Gregory, Partner

In early 2020, the country and the world strived to navigate an unsettling paradigm shift. As fear mounted and the words “shelter in place” became all too familiar, businesses large and small scrambled to find new ways to engage with clients and customers.

But the skilled financial advisors at Freedom Street Partners didn't miss a beat; innovation powers the place and has from the start. “We were ready for this pivot,” says founder and CEO Scott W. Danner. “Our practice has a dynamic online presence. If our clients are using these technologies, then we belong there, too. It's all about connection and staying ahead of the curve.” With more than 100 inspiring, multitopic videos on the company's YouTube channel, the ability to meet strategically with team members with the click of a mouse, and, most importantly, Danner's passionate, positive

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MANY FINANCIAL ADVISORS JUST WANT TO HAVE A RELATIONSHIP WITH YOUR MONEY. AT FREEDOM STREET, WE WANT TO HAVE A RELATIONSHIP WITH YOU.”

SCOTT W. DANNER,
FOUNDER AND
CEO, FREEDOM
STREET PARTNERS

leadership, the company is poised to keep clients informed, engaged, and empowered, even during a global crisis.

Danner, along with partners Andrew Gregory and Reed Sloat, founded Freedom Street Partners in 2016, and the executive team is rounded out by COO Valerie Rivera. The firm's growth has been extraordinary—from approximately \$100 million in assets under management to over \$1.5 billion in just four years. The Freedom Street Partners team has accomplished this through providing leading-edge client services and creating a company that other advisors are motivated to join. Today, the firm has a presence throughout Virginia and in Illinois, North Carolina, Georgia, Tennessee, and Alabama and continues to grow.

Steps to Financial Clarity

“The backbone of what we do is investment management,” Danner says. “We have to do that well, and we do. Next is scenario planning: If this happens, then what? Do you want to retire at 50? Pay for your grandkids' education? We chart the path that gets you there.”

It's in describing the third facet of the team's work that Danner's enthusiasm becomes most vivid. “We are life coaches who specialize in money and finances. We want to know who you are and what you want to be when you grow up—even if you're 70.”

Danner recalls an initial consultation with a couple contemplating retirement. He asked how they envisioned the next stage of their life. The husband answered quickly: They'd move to their country house full time and get back to the land. His wife looked at him quizzically. “She said, ‘Our grandkids are here, and I'm not moving anywhere,’” recalls Danner. “They'd never had this critically important conversation before. It was an honor to help these people eventually identify and realize their shared goals.”

The Freedom Street Partners team is united in a desire to be part of something bigger than themselves, says Danner. Each year, advisors and clients collaborate on events such as the Chesapeake Virginia Wine Festival to raise millions for a variety of area charities. “Giving back is an integral part of who we are,” he says. “I am endlessly proud of the people I work with—and the difference we are making in the lives of our clients and our communities.”

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