

suburbanlife

High-net-worth clients turn to **Marianne Inforzato** and the team at **Fairman Financial™** for solutions to an array of complex financial issues.

page 38



**Also
Inside:**

Top physicians,
leading women,
and more



INVALUABLE

High-net-worth clients turn to **Marianne Inforzato** and the team at **Fairman Financial™** for solutions to an array of complex financial issues. by **Bill Donahue** | photos by **Jody Robinson**

Every year has its share of volatility and uncertainty. Given the many seismic events happening around the world and close to home, however, 2024 seems more volatile than most—and investors are looking for a steady hand and a reassuring voice to guide them through the increasingly unpredictable terrain.

Enter Marianne Inforzato, CFP®. Inforzato is one of the four founding partners of Fairman Group Family Office, a Chesterbrook-based firm devoted to offering well-informed guidance to high-net-worth individuals and families. Inforzato roots her practice in estate and tax planning, through which she helps clients preserve their wealth for future generations. A CERTIFIED FINANCIAL PLANNER™, Inforzato sees her primary roles as educator and problem solver.

“Our clients come to us with complex problems and concerns,” she says. “When we work with someone for the first time, we look at their current estate planning documents, talk through their goals and what they hope to accomplish, and then we devise a plan. That plan might involve gifting, trusts, or other entities, but there are a lot of unique types of strategies we can utilize to address their specific concerns.”

Given that taxes are often the largest expense that both individuals and trusts face, tax planning is at the heart of Inforzato’s work. She specializes in planning around the tax implications of client decisions concerning retirement, concentrated equity, multistate residences, insurance, and charitable planning, among others. She also oversees the most complicated tax returns, and works with clients on proactive, strategic tax planning. Her expertise includes helping family-owned

businesses with succession planning and its related tax issues. Of course, she also collaborates with the firm’s investment advisory group to ensure client portfolios are tax efficient.

“While much of this work focuses on minimizing taxes,” she adds, “the greater emphasis is helping clients achieve their non-tax objectives. We want to show them various planning options so that they can make informed decisions.”

Inforzato and her three fellow partners at the firm have vast experience, and each possesses a unique area of specialty, ranging from investments to taxes to strategic financial planning. As a result, the firm can take a holistic, multidisciplinary approach to preserving and enhancing a client’s wealth in ways that other financial service providers may not.

“We provide a lot of value to some very smart people,” Inforzato adds. “One thing that many of my clients have in common is that, while they may be financially knowledgeable, they lack the time, willingness, or ability to do it themselves. We’re a completely independent firm, and we embrace the fiduciary standard to which we are held. We don’t sell prod-



We try to turn all the cards face up, so our clients understand the avenues available to them.”

— Marianne Inforzato, CFP®

ucts; we’re here to provide advice that is 100 percent in our clients’ best interest.”

Beginning in June 2024, clients will notice a subtle but important change to the firm’s identity, which more accurately reflects the value it provides to clients and their families. The partners rebranded the firm as Fairman Financial™, with the tag line: “Advice from every angle.”

“We try to turn all the cards face up, so our clients understand the avenues available to them,” she says. “Our new identity emphasizes that goal, which is to educate clients on the various possibilities. We’re still a family office, but Fairman Financial™ reinforces the fact that we are uniquely qualified to look at their financial picture from many different angles: tax planning, retirement planning, investment management, estate and gift tax planning, charitable planning, insurance—every aspect of their financial lives.”

‘Part of the Family’

Inforzato’s career dates back to 1993. After graduating *summa cum laude* from the Wharton School at the University of Pennsylvania, where she earned a bachelor’s in economics with a concentration in finance and insurance, she joined the Philadelphia office of the accounting firm Arthur Andersen. That’s where she met the three individuals who would join her in founding Fairman Group Family Office in 2002: Roy M. Fairman, CPA/PFS; Shawn Kindt, CPA/PFS, CFP®; and Doug Morisoli, CPA, CFA®, CFP®.

From the very beginning, Inforzato and her fellow partners sought to form lasting relationships with clients, each rooted in transparency and trust.

“We still have some of the clients from back then, and I think that speaks to the truly personal nature of the work we do,” she says. “With some of our longer-standing clients, we’ve gotten to know their children very well, and even their grandchildren. It’s like we become part of the family.”

At the outset of Inforzato’s career, relatively few women in the wealth-management industry held leadership positions. Some firms still have a male-centric workplace, but that’s not the case at Fairman Financial™. Women account for more than 50 percent of Fairman’s employees, and that includes two female principals: Margaret McGarrey, CPA, and Lee Profy, JD, LLM.

“It’s helpful to have a woman partner and to have other women in leadership positions,” Inforzato says. “It’s been terrific, especially for clients, because some clients are more comfortable with women. Everyone has gifts they can provide, and I think women provide a different perspective, or maybe just a different sensitivity. Ultimately, having that kind of diversity on our team is going to help us do a better job for our clients.”

Fairman Financial™ strives to be a family-friendly firm in which each employee can achieve a satisfying work-life balance. Also, Inforzato says the firm provides mentorship opportunities to help women—and all employees—achieve their full potential. She credits many of the firm’s female members for spearheading efforts to get more intimately involved in community outreach programs and supporting philanthropic causes.

“This is a great organization and a great place for people to work,” she adds. “That’s incredibly important for

many reasons, including the fact that it enables us to better serve the clients who rely on us to help them solve complex tax and financial issues.” ■

About Marianne Inforzato

Marianne Inforzato has earned the Five Star Wealth Manager award multiple times over the past decade. In addition to her work with Fairman Financial™, she is a longtime member of the Philadelphia Estate Planning Council.

Inforzato and her husband have two children, a 15-year-old daughter and a 14-year-old son, whom she describes as “the lights of my life.” Her other interests include listening to rock and classical music, and reading novels filled with action and drama. A self-described “nerd,” she adores science fiction, and is the rare person who considers herself a fan of both *Star Wars* and *Star Trek*.



Fairman Financial
1200 Liberty Ridge Drive, Suite 320
Chesterbrook, PA, 19087
(610) 889-7300
fairmanfinancial.com

Investment advisory services are offered through The Fairman Group LLC, a registered investment adviser with the Securities and Exchange Commission.