By Jane Peterson
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When Jason Van Duyn decided to open his own financial consulting business in the midst of the nation's economic crisis last year, he knew it wasn't going to be easy. But the 31-year-old CERTIFIED FINANCIAL PLANNER™ was up for a challenge and he forged ahead with his plans.

With his youthful energy backed up by years of experience in the financial services industry, he founded Aquest Wealth Strategies. His goal was simple: To provide objective advice to his clients. As an independent financial advisor, he doesn't offer any propriety securities or insurance so he doesn't have to worry about filling sales quotas or pushing certain products – all he considers are his clients' needs and what is suitable for their financial future based on their individual goals.

“Being independent is a huge advantage,” he said. “There are no proprietary products, so I can be objective when it comes to recommending financial products for my clients.”

Working in the financial services industry since the late 1990s, Van Duyn has a solid work record and impressive education credentials. He earned his undergraduate degree from Walsh College and his MBA from Northwood University. He has two industry designations: Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU), and is a CERTIFIED FINANCIAL PLANNER™.

Van Duyn also aligned himself with LPL Financial, a large independent broker/dealer. Aquest makes available through LPL Financial a full slate of financial products, including annuities, stocks and bonds, life insurance, mutual funds, liability insurance and 529 plans. Services like risk management, debt management, college planning, retirement planning, estate planning and more are covered under the financial umbrella of Aquest's total wealth management philosophy.

Van Duyn and his team are constantly reviewing the ever-changing economy and industry best practices to educate their clients about the current economic environment and make recommendations based on the latest information.

Although each financial product and service that we offer is important in its own right, the goal of the AQUEST team is the cohesive management of every aspect of your financial situation. By taking a holistic approach to managing your total financial situation, AQUEST is able to help you pursue your financial goals; not just improve one area of your complex financial life. By respecting the interdependence of your financial aspirations and the resources available to reach those goals, we are able to maximize the allocation of your resources.

Working hand in hand with Aquest Wealth Strategies is a separate company, Aquest Tax Solutions, which offers the proactive tax planning and preparation service of its certified public accountants. This allows Aquest clients to take care of multiple financial needs with team members they trust and respect.

A key to Van Duyn's success is the way he treats his clients. Because he manages their total wealth, he spends more time with them learning all about their goals, finding ways to support their needs and watching out for their interests. He utilizes an open architecture investment platform which gives clients the choice between a fee-based model or a commission platform.

Although only open for a little under a year, Aquest Wealth Strategies is growing. Van Duyn said plans are under way for a new office that will house the growing team of staff members.

Aquest Wealth Strategies is located at 43370 Mound Road in Sterling Heights. For more information, call (586) 731-6020 or visit www.aquestwealth.com. The Web site is filled with all kinds of helpful financial information including tax resources, forms and various financial links.