Your Money: Banking, Finance, Wealth Management

Archford celebrates 10th anniversary: *A decade of heartfelt growth!*

By Dr. Ronda Sauget, MBA, Archford Strategic Consultant

As Archford celebrates its 10th anniversary, we share a story of building a collaborative environment, a one-stop shop where comprehensive services are brought together to serve our extended family of over 1,500 clients. Our journey began with Jim Maher, our Founder and CEO, who, after 25 impactful years with national firms in wealth, tax, and financial management, envisioned a better way forward. With his passion he brought together a multitude of professional services, addressing every professional service need of our valued clients. This story begins with empowering family-owned businesses, nurturing their multi-generational dreams, and enabling lasting legacies for their families and their communities.

Ten years ago, Archford emerged with the unwavering support of Jim's family and six like-minded professionals, all seeking to reengineer the client professional services experience. Jim's personal journey started with a law degree, then came the CPA, and was followed by an array of professional certifications, each building on his desire to improve client service. Headquartered in Swansea, Illinois, our firm now spans multiple locations and thrives with over 50 dedicated team members.

In 2013, Archford Capital Strategies unveiled its wealth and financial management services, intentionally created to better serve families with taxable estates and those who own businesses. A hub-and-spoke model was designed to intricately understand our clients' financial implications, life phases, and business patterns to serve multi-generational families. This enables the clients' data to be maintained and updated as life evolves. Jacob Hong, our COO, leans into technology, putting financial data at the clients' fingertips.

2014 marked the beginning of our business consulting wing, anchored by professionals like Ron Buerges and Jim Woodcock, these leaders brought mergers, acquisitions, and negotiations to life. In 2017, Chuck Brueggemann joined the consulting team. Chuck now serves as the Chief of Staff and leads the Business Consulting practice. Chuck, a transition coach, works toward preserving harmony within families as they transition wealth or their business from one generation to another.

In 2016, the electronic Archford Family Library was developed, a repository for documents vital to our clients' existence. Imagine a world where trusts, tax returns, insurance, 1040's, and personal documents are maintained, easily accessible, forever freeing clients from frantic document requests. Saving clients time is one of our highest priorities.

Archford Angels came to life in 2017, a program that supports the community-based causes that are important to our team members. Through the efforts of these inspired individuals Archford has contributed over $1M to 88 community initiatives, establishing Archford as a force of positive change within our communities. Jim Maher indicated, "We are really proud of this program!"

Come 2020, Archford Accounting took center stage, led by Amanda White focusing on tax planning, preparation, and accounting services. The firm thrives through the use of innovative technology, easing clients' financial journeys.

Then in 2022, Jeff Keiser, JD., was recruited to join the Archford team. A well-known leader in estate planning and trust administration, Jeff is renowned for his multi-disciplinary tax savings approaches. Jeff was brought to Archford to serve as the Director of the newly formed Family Office.

Amid awards, accolades, and growth, our journey continues. Our compass points towards holistic service, painting the landscape of successful expansion and higher-level decisions for the benefit of our clients.

As we embark on our next decade, we invite you to be part of this journey, where your aspirations are brought to life and your legacy achieves the impact you desire.

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