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## Sustainable Wealth Advisors: The Company Story

Harry Moran started working for a mutual fund sales company in December of 1986. When “Black Monday” hit in October of 1987, management threw a party that night, complete with “dunking for apples.” Since the vehicles their reps sold were primarily bond funds, they looked at this event as a win for them and an opportunity to gain market share by taking advisors’ clients who were left reeling from their stock losses. The complete lack of compassion for these clients whose wealth had been severely diminished, or for the many advisors who had recommended appropriately diversified portfolios, was a shock to Harry and made him determined to find another way to do business. Long before it was expected that advisors serve as fiduciaries and put their clients’ interests first, that was his goal.

In 1988, Harry’s practice found a new home with an independent broker-dealer that proved to be a much more client-centric environment. Eliminating proprietary products and having the flexibility to recommend solutions from a wide array of options, was a significant step forward.

With 24 years of industry experience now under his belt, in 2011, Harry formed Sustainable Wealth Advisors (SWA) to be able to design a firm from the ground up. Incorporating values-driven investing in his approach created a perfect opportunity to fully realize this vision and put people and planet on the same plane as profit. Harry states: “Understanding our clients’ deepest personal values and convictions is the starting point and foundation for all the firm’s relationships.”

Financial planning is also a key element of this vision. Once Harry understands a client’s core values and goals, he works on building a solid financial plan to provide the framework and context for all decision-making. While some advisors are all too willing to dispense with this labor-intensive process, Harry believes it’s a critical factor in maximizing the likelihood of a successful outcome for the firm’s clients.

Moran’s desire has always been to create a safe environment, where his clients feel respected and understood, regardless of their financial status or goals. Harry adds: “SWA goes the extra mile to allow clients to confidently and easily delegate some of their day-to-day financial decisions so they are freed up to pursue their life’s dreams.”