FINANCIAL PLANNING

The Value of Financial Planning

My mission is to help individuals and families pursue their financial goals by making prudent and tax-efficient financial decisions and minimizing costly money mistakes.

Characteristics of people we help

- Serious about achieving personal financial success
- Goal-oriented
- Collaborative
- Like to leverage other people's expertise
- Desire financial organization

Clients who might benefit from our help

- Individuals planning for and nearing retirement
- People faced with a major financial decision due to divorce, retirement, death, or inheritance
- Business owners who need to find ways to diversify beyond their business ownership
- Business owners exploring ways to exit their business and unlock their wealth
- Individuals who are seeking assistance with financial planning

Key results of financial planning

- Reduced financial stress
- Family financial alignment
- Confidence to work towards and attain financial goals
- Manage financial pitfalls and inefficiencies
- Assurance in making smart financial decisions

Areas of experience

- Investments & Asset Allocation
- Retirement planning
- Distribution planning
- Tax planning
- Debt management
- Goals-based saving
- Insurance assessment
- Partnering with other financial professionals
- Risk management
- Cash-flow planning
- Estate planning
- Charitable giving
- Business financial planning

LPL Financial

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We work with a wide variety of clients who find meaningful value in the planning we can provide. My goal is to expand the positive impact we have and help more people in our community. Would you be willing to introduce me to a few people who could benefit from my services? I'd be happy to have an initial conversation with them to see if it would be of mutual benefit.

Introductions: Names/Contact Information
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3.
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