THE VALUE OF FINANCIAL PLANNING

MY MISSION: TO HELP INDIVIDUALS AND FAMILIES PURSUE THEIR FINANCIAL GOALS BY MAKING PRUDENT AND TAX-EFFICIENT FINANCIAL DECISIONS AND MINIMIZING COSTLY MONEY MISTAKES.

Areas of experience

- Asset management
- 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

Characteristics of people we help

- Serious about achieving personal financial success
- Goal oriented
- Open minded
- Like to leverage other people's expertise
- Desire a structured planning process

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

LPL Financial

The Value of Financial Planning

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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