

Our Planning Arrangements

Our Fee Based Arrangement:

You are buying wisdom, experience, and the ability to navigate financial markets through economic changes

Non Biased Recommendations

Quarterly Reviews at your convenience

Planning based on your entire financial picture

Concierge Service

Significant effort and time invested in getting you from where you are, to where you want to be

We listen to your worries and concerns, and develop customized strategies

Services:

Cash flow & Budgeting

Money Management Solutions

Portfolio X-ray

401(k) analysis

Business & estate planning included

Access to resources outside our scope of planning: Tax Specialists, attorneys, & loan/debt specialists

Our Commission Based Arrangement:

Planning is focused on a single need
We are compensated only on solutions we implement for you
One meeting per year is included

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