

SHOULD YOU WORK WITH SECURE PLANNING STRATEGIES?

That is a good question. The answer is “maybe.”

If the following information resonates with you, let's meet and talk.

It's all about you

Our goal is to steer you in the right direction. We're passionate about what we do, and are dedicated to helping families with Special Needs children. We understand your unique concerns and are committed to helping you find appropriate, meaningful solutions to relieve those burdens. And, even if it turns out that we aren't the right fit, we'll help connect you with professionals who are.

Special Needs, Special Worries

All parents worry about their children. But those who love and care for Special Needs children have additional concerns that become ever burdensome with each passing year. Here's what our clients tell us is important to them:

- “How can we afford the specialized care our child needs?”
- “Who will take care of our child when we're no longer here?”
- “What government or community resources exist to help us?”
- “What should future trustees, or caretakers, know about our child?”
- “Where will my child live in the future?”

Caring for your Special Needs child in the best possible way

Our clients want their advisor to have:

- A clear and empathetic understanding of their unique family situation, providing the right guidance for a secure future for their Special Needs child.
- A thorough knowledge of the Special Needs laws and government benefits. This way, he or she can provide ongoing guidance and keep clients informed about changes in these resources.
- A caring, compassionate attitude and deep commitment to the Special Needs community in particular.
- A clear understanding of each individual situation along with the ability to develop investment strategies that will last through and after the parents' lives and will continue for the life of the Special Needs child.
- A responsive, clean and open dialogue, offering practical, realistic solutions that are customized for each family's special situation.

Our team understands the pressures that come with caring for a Special Needs child and, together, we can help you find peace – peace now and peace in the future.

Let's get started

If any of this sounds like you, then let's meet and get to know each other better. Call us at 248-827-2580.

We look forward to building a brighter future with you.

Secure Planning Strategies



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