

TIMOTHY M. CARLSON



Timothy M. Carlson
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 FINANCIAL SECOND OPINION™

 LIFETIME INCOME MODEL™

 PLAN FOR FINANCIAL COMFORT™

 THE BUSINESS OWNER MODEL™

 LEGACY DISCUSSION™

 THE INTEGRATED 401(K)™

Financial planning can help make the difference between those who enjoy a comfortable retirement and those who struggle. Timothy Carlson can help you toward the retirement you deserve. Tim receives support from Integrated Financial Partners and LPL Financial. Together they bring a wealth of resources and creative solutions so you can live your life with confidence toward achieving life's great goals.

Along with his team, Tim uses a comprehensive process so he is better able to align your goals with the appropriate financial tools. The process includes:

Needs Assessment: This entails clearly defining your goals, evaluating your risk tolerance and identifying any factors that may impact your plan.

Analysis & Design: By identifying any gaps, Tim can then offer alternative strategies and identify strategies that are appropriate for your situation.

Implementation: The plan is then carefully executed to help ensure that a long-term focus is maintained.

Service & Support: Long-term relationships are vital to help ensure that you continue to be well informed and better able to make appropriate and opportune decisions as your needs change.

Tim has strong ties to the local area. Born and raised in Holden, he graduated summa cum laude with a Business Degree from Becker College. He now lives in Rutland, MA with his wife and three children.

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