

FINANCIAL PLANNING

WHAT MAKES SENSE FOR YOU?

A financial advisor may be able to help you determine what investments may be right for you, your family and your lifestyle

Financial planning is the long-term process of professionally managing your money to try to meet your financial goals and aspirations. Financial planning takes into account the personal and unique financial situation of you and your family over the long-term.

Whereas a stockbroker helps you pick stocks, a financial advisor works with you to build a complete plan for your financial matters. This strategy will be based on your particular situation and life goals and attempt to get you to where you'd like to go. This takes into account aspects of your financial life such as cash flow, taxes, your children's education, estate planning, insurance and more. To accommodate these needs, your financial advisor will help you choose from a wide variety of investment vehicles that will comprise your individual investment plan.

A financial advisor will work with you to build your plan

While building this plan may be the first step, your financial advisor should stay with you throughout the lifetime of the plan to execute it and make changes accordingly. A solid strategy involves often changing courses with changes in your life, both expected and unexpected. A good financial advisor is one who will get to know the needs of you and your family, and who will help ensure that your plan is tailored to accommodating them. A financial advisor can be as important as the health professionals in your life, assisting with your financial health. Think of your advisor as your financial coach, working to help you throughout your financial lifetime, and even after.

First step: assess your needs and goals.

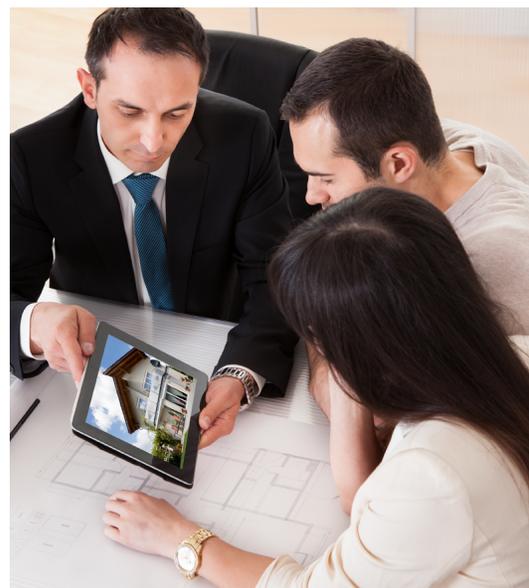
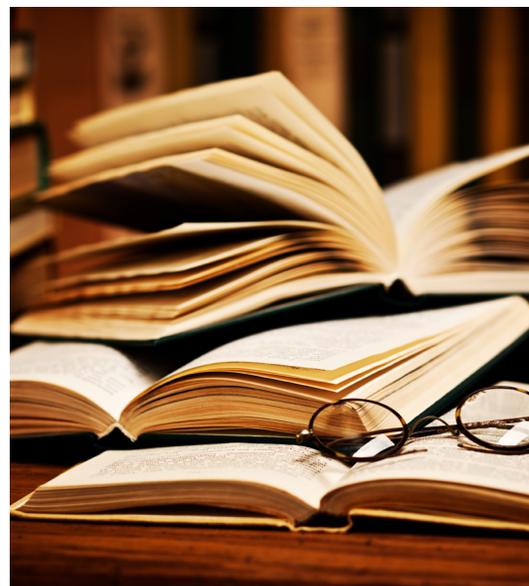
Our office works with many people like you, and it all starts with assessing your needs and goals. We develop a complete picture of your situation along with a realistic plan to help pursue these goals over the course of your lifetime. By staying in regular contact with you, actively managing the investments that make up your plan, and then monitoring its progress, we help ensure that your plan stays on track. As your situation evolves, the market or laws change, we'll seek to ensure your plan is modified accordingly.

We help your plan stays on track

While many individuals prefer a "do-it-yourself" approach to investing, employing the advice of a professional financial planner offers many rewards. We can help you to get started in what can seem like a daunting process for those without the experience, time or desire to manage their finances.

Because each financial situation can be complex in its own way, we often work together with other specialists to help ensure your best interest is represented. Additional professionals such as attorneys, estate planners, accountants and insurance agents can play an important role in developing and executing your financial plan.

We'd like to help you make the most of the opportunities available to you and promise to act with objectivity, experience and honesty. Our services seek to help you meet your financial goals and dreams one step at a time. Allow us to assess your financial health and put you on a plan that suits you and your family. Call us today at 401-596-0193 to discuss how we may be able to help you.



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