FEE-ONLY FINANCIAL PLANNING

YOU DREAM IT. WE PLAN IT. YOU LIVE IT.

Together, we'll build a foundation that supports your dreams and goals, keeping you secure during all phases of your life's journey.

PARTNERS
IN FINANCIAL PLANNING

At **PARTNERS IN FINANCIAL PLANNING**, we provide tax-focused, comprehensive, fee-only financial planning and investment management services. Located in Salem, VA, and Charleston, SC, we serve clients locally and across the country.

Serviced by a team of professionals with more than 100 years of combined financial services experience and knowledge, we work to exceed expectations, and our clients are the focus of everything we do.

Why Fee-Only?

Since we are a fee-only planning firm, our fees are not from product sales or commissions. Our fee-only approach makes our fees simple and understandable. It aligns our interests with yours, giving you the confidence and peace of mind you desire and deserve.*

Our Fiduciary Role

As members of NAPFA (National Association of Personal Financial Advisors), we annually attest our commitment to our clients by affirming the NAPFA Fiduciary Oath.

Following the NAPFA Fiduciary Oath means we will:

- ✔ **Always act in good faith and with candor.**
- ✔ **Be proactive in disclosing any conflicts of interest that may impact a client.**
- ✔ **Not accept any referral fees or compensation contingent upon the sale of a financial product.**

Our fee schedule is available on our website:* **www.partnersinfinancialplanning.com

Our Values

We Care
We provide ongoing support and advice for whatever life brings you, always aiming to be proactive, attentive, reliable and available when you need us.

We Work Together
You will have a dedicated team of professionals working together to support all aspects of your relationship with us and address any concerns along the way.

We Are Authentic
Open and honest communication is essential to providing you with the objective advice you deserve and a relationship built to last.

We Are Visionaries
To be prepared for today and tomorrow requires planning. We listen to what matters most to you and work alongside you on how to get there.

We Value Trust
As your fiduciary Certified Financial Planner, we have the knowledge and the experience to provide a comprehensive plan always in your best interest with no commissions or incentives.

We Make a Difference
Caring about you and your financial wellness is our mission. Watching you achieve your dreams and create a lasting legacy is a joy and a celebration.

OUR MISSION IS SIMPLE:

To care about YOU and your financial wellness.

Welcome to PARTNERS IN FINANCIAL PLANNING, LLC.

As Financial Advisors, we provide personalized, objective advice that focuses on your financial goals over the long term, while maintaining your financial security. We see our relationship as a partnership as we work together in your best interest.

PARTNERS IN FINANCIAL PLANNING

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