FINANCIAL FREEDOM

Save More. Play More.

Together, we'll help get you to where you want to be.

PARTNERS
IN FINANCIAL PLANNING

FINANCIAL FREEDOM is for those clients who are beyond our Financial Foundations service and desire comprehensive, fee-only financial planning designed to provide a varied array of complex services. These services will match your needs and goals over all the days and years of your life and the lives of those you love. As your financial planning partners, we want to provide the services to keep you secure during all phases of your life's journey.

Financial Freedom

This service includes:

- ✔ Goals feasibility analysis
- ✔ Insurance planning, including health, life, disability, long-term care, and liability
- ✔ Retirement cash flow planning
- ✔ Investment and retirement planning
- ✔ Estate planning (general recommendations as we aren't attorneys)
- ✔ College planning strategies
- ✔ Investment management — ongoing portfolio monitoring and rebalancing
- ✔ Income tax planning

Additional services we provide:

- ✔ Tax preparation *(for an additional fee)**
- ✔ Small business consulting
- ✔ Coordination with your other professional advisors such as attorneys, bankers, CPAs, and insurance agents
- ✔ Referrals to other professional advisors, as needed

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

Our Process

Get Acquainted
We want to get to know you! During a 30- to 60-minute, no-cost initial meeting, we will discuss your goals and aspirations.

Create a Plan
We develop a customized plan that addresses your specific goals and needs with a holistic approach to your financial wellness.

Follow Through
We will guide you as you live out your plan, and meet with you regularly to assure you of your progress.

Long-Term Investing
Financial planning is an ongoing process. Investing should be seen as a long-term commitment.

Diversification
Every investment has risk and offers potential rewards. We help you evaluate your goals and tolerance for risk, and determine an investment allocation that makes sense for you.

No Market Timing
We believe in sticking with an allocation developed just for you through the inevitable ups and downs of the market.

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

You Dream It. We Plan It. You Live It.

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