

The future is yours. I can help with information about retirement planning.

Let's get acquainted.

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Shoulder to shoulder, working toward your financial goals

You may be thinking about your financial goals. You wonder, "How much will I need to reach them?" "How much should I be saving?" "Am I on track to reach a comfortable retirement?" These are challenging questions, but they're ones I can provide information that will help you find answers.

With this information, you can move toward your objectives, while keeping you in financial control along the way.

No matter what stage of life you find yourself in, you're never too young or old to prepare for your financial future. I can help you get the conversation started.

A bit about me

I have more than 23 years of financial services experience, so I can help you develop and implement holistic financial solutions. Specifically, I can:

- Help you review your plans for the future and compare them to how (and how much) you save
- Design a financial plan and help you follow it
- Create retirement-planning action steps based on your personal goals
- Provide ongoing personal guidance and advice to help you manage your plan
- Explore estate planning options to help you leave a legacy
- Help you develop a budget for today's expenses and for living in retirement
- Work with you to create a succession plan for your small business

I hold the following registrations, licenses and/or professional designations:

- Series 6 - Investment Company/ Variable Contracts Products Representative
- Series 7 - General Securities Representative
- Series 63 - Uniform Securities Agent State Law Examination
- Series 65 - The Uniform Investment Adviser Law Examination
- Certified Financial Planner (CFP)
- Life, Health and Variable Annuity Insurance license

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