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As a Financial Advisor I work to help people improve their financial position. We work together in an attempt to create wealth, then protect it, transfer it and distribute it. At times like this, it can be challenging. It can also be very rewarding because helping people improve their financial position means more to me than merely increasing their net worth.

It means I may have a small part in moving them towards not being among the 54% of retirees that are still working after 65.

It means helping people send their children to college.

It means giving a small business owner a chance to exit a family business, enjoy the fruits of his, or her, labor and still pass a thriving business on to the next generation.

It means I spend my time working with people of vision that want a lot from life and are willing to work hard to help ensure they get it.

The process is simple. There are four steps:

1. I work with my clients to set and prioritize their goals. We talk specifically about where you are today and where you want to be in the future.
2. Together we develop an "action plan" that is designed to help you get where you want to be financially. This is designed for you based upon where you are and what you want to accomplish.
3. We implement the plan in order of what is most important to you. If we can't do everything at once, we'll put things in place as soon as possible.
4. We meet regularly (at least annually) and monitor our progress. When necessary, we make adjustments.

Typically, over time, we become good friends and that makes my career especially rewarding to me.



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