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Financial Planning

Team

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Overview

A cohesive financial plan incorporates goals, ideas and data from all aspects of a family's financial life.

Our investment advisors, all of whom hold advanced financial designations such as CERTIFIED FINANCIAL PLANNER™, Chartered Financial Analyst, Certified Trust and Fiduciary Advisor, Certified IRA Services Professional, Accredited Estate Planner and Enrolled Agent, assure that financial decisions are based on a complete view of financial resources, spending levels and family priorities.

We help clients with:

- Budgeting
- Education planning
  - 529 accounts
  - Custodial accounts
  - Minor trusts
- Retirement planning
  - IRA, SEP and other retirement account management
  - Maximizing tax-deferred account contributions
  - Social Security and pension considerations
  - Retirement cash flow planning
- Charitable giving
  - Tax-aware gifts of cash, securities or other assets
  - Gift fund accounts
  - Gifts from IRAs
  - Charitable trusts and family foundations

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