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Tax Planning

One of my visions over the years has always been to create an office that could help business owners, pre-retirees and retirees review all their financial concerns. When you do a comprehensive financial plan we can determine if you have tax credits or deductions that may not have been utilized or review the ownership and beneficiaries on your accounts to help ensure they are aligned with your investment and estate planning strategies.

What' s important about doing a financial plan is that we can project, based on certain variables such as rate of return, inflation, expenses, and social security income, what you need to do to retire at a certain age. And when retired what to do in order to prepare for financial independence!

** By giving us your name, phone number, & Email we can send a link to get a chapter of my book "Simple Strategies to Reduce Estate & Income Taxes" or an article that would address this issue. Our team can connect with you and help you accomplish all your goals and answer all your questions!