

# The future is yours. I can help you prepare for it.

Let's get acquainted.

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## Shoulder to shoulder, working toward your financial goals

I bet you think a lot 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 help you answer.

Together we can develop a personalized plan with realistic steps to help you 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. Call me to get the conversation started.**

## A bit about me

I have more than 25 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 63 - Uniform Securities Agent State Law Examination
- Series 65 - The Uniform Investment Adviser Law Examination
- Life, Health and Variable Annuity Insurance license

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