



Your Complimentary Financial Plan

Here's what to expect...

An understanding of what's truly important to you and your family

The beginning of any good financial plan is an understanding of who you are, how you got to where you are today and what's important for you and your family.

A Fee and Cost Analysis

We'll do a complete fee and cost analysis to determine what it's costing you to work with your current advisor.

A Risk Analysis

We'll do a complete risk analysis so that you can understand, for perhaps the first time ever, the real level of risk in your portfolio.

A Portfolio and Goal Analysis

We'll analyze and discuss with you how well your current portfolio matches what you're trying to accomplish.

Our Recommendations

We'll give you detailed recommendations if needed to help you better align your portfolio so that you can achieve what's truly important to you and your family.

You've worked hard to achieve the lifestyle that you enjoy today. Your Plan is an important step to help protect and grow that lifestyle through a safe and secure retirement.

Bill Geiger