



Complimentary Consultation, Retirement Review and Financial Plan for All Active SCMEBF Participants and Family

Our firm specializes in helping individuals develop sound retirement strategies. If you are retired – or approaching retirement – please take the time to explore our website and the wealth of information we offer. We offer personalized, hands-on service. We educate our clients about financial concepts, products, and take the mystery out of investing, insurance, estate conservation, and preserving wealth.

We understand the many challenges of retirement today and know the biggest concern for many is outliving their money. We focus on money management, as well as other issues that are critical to your financial wellbeing.

Financial Planning

Pension Analysis
Workplace Retirement
Deferred Comp/ 457(b) Planning
Retirement Plans
403(b) Planning
College Plans
Estate Plans

Investments

Tax Managed Investments
Brokerage Accounts
Fixed Products
Bonds
Common Stock
Educational IRA
Traditional IRA
Roth IRA
SEP IRA
Simple IRA
Annuities

Insurance

Disability Income Insurance
Life Insurance
Long-Term-Care Insurance
Aflac

Contact us for a Complimentary Consultation

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