FINANCIAL
FREEDOM GROUP

Five Steps to a Confident Retirement

We specialize in working with professionals, as well as those individuals at or nearing retirement. Our clients appreciate quality education and demand a firm who places high value on proper planning. Helping you grow your wealth is one thing, turning it into income the right way is another. We'll be here to walk you to and through retirement. We encourage you to call anytime whenever you would like to talk. There is no charge for appointments and our goal is your happiness and success.

DISCOVERY

The first meeting is mutual discovery. Our team gets to know you, and you get to know us. We learn where you stand financially. You learn our philosophy, process and how we function.

ANALYSIS

We analyze the information gathered in the Discovery meeting and prepare Retirement Income Analysis Reports and Social Security Maximization Reports. Then we prepare investment plan proposals and recommendations.

ACTION PLAN

We work together to fine-tune a plan that meets your needs and requirements. We educate you on why we are making specific recommendations. This step allows you to make the best decisions regarding your financial wellness.

IMPLEMENTATION

We implement a plan that meets your needs and requirements. This is not a one-time plan as needs and requirements evolve over time. We are with you every step into your financial future.

REVIEW

During regular reviews we evaluate your progress and make necessary adjustments as your needs evolve. This keeps you on course to Retirement Success.

Contact us at
585-244-9444