

Alphabet soup

got you confused?

We can help clear that up

You'll see lots of letters after the names of some financial planners. We can help clear up what all those letters mean.

The CFP® professional credential is the industry gold standard and means you're dealing with an expert.

We have **FOUR** **CERTIFIED FINANCIAL PLANNER™** pros in our office available to serve you and your family with fee-only/no-commission financial advice in-person or virtually.

We're proud of our letters and invite you to meet the planners in front of them.

Retirement Planning | Investment Planning
Tax Planning | Elder Life Planning
Financial Life Planning for your Great Life



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