

strategic financial planning

DO YOU KNOW WHERE YOU'RE GOING FINANCIALLY?

Daily life activities are complex and time consuming. Most of us are too busy to lift our heads up to figure out where we are and where we will end up. Taking the time to assess your situation and develop a financial strategy will help you reach your goals and relieve the stress that comes with not knowing where you're going.

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ASK YOURSELF THE FOLLOWING QUESTIONS:

- What are your financial goals — are they realistic?
- Do you have an emergency fund?
- Are you able to save?
- Will you need funds to educate children?
- Will you have special needs children or parents?
- Do you have adequate insurance to manage your risks?
- How are your investments doing?
- Planning on retiring some day? How will you do it?
- Are you paying too much tax?

HOW WE CAN HELP

Our consultative approach to strategic financial planning centers on your individual goals and expectations. We meet to assess your situation and develop a realistic road map to achieve your objectives, whether they are short term, such as budgeting, or long term, such as a comfortable retirement. During this process we will analyze your current situation and develop concrete recommendations and an action plan for you to focus on your needs.

WHY CHOOSE REDW STANLEY?

Our experienced staff includes CPAs, Personal Financial Specialists, Certified Financial Planners and Chartered Financial Analysts, several with decades of experience. REDW Stanley is a fee-only service provider, meaning the only revenue received is that from the client. We do not earn or accept any commissions, rebates, 12(b)-1 fees (unless rebated back to the plan), referral fees, or other remuneration direct or indirect based upon our recommendations. We accept no product provider incentives. You can be confident our recommendations are based entirely on your needs and that we will advise you with only your success in mind.