

For those clients who are seeking help or advice on a particular issue or concern, we offer an hourly planning service to address your specific needs.

This service can be used for advice on many topics such as:

- Second opinion of current investments or portfolios
- Lump-sum investment recommendations
- College funding advice
- Retirement needs analysis
- Budgeting
- Debt reduction
- Social Security planning

For example, we can offer a second opinion on your current investment strategy, run scenario comparisons, calculate savings goals, provide information on education or retirement savings plans, run social security optimization calculations and many more areas.

Using this service, you tell us what you need and we will provide whatever analysis, research or data comparisons are necessary to address your concerns and answer your questions.