

**Call Us: 305-648-9814**



## Get More than Just Investment Management

We believe you can achieve a more secure financial future by having a complete view of your finances, and by having a clear strategy to help you attain your goals. This is the reason why we begin every client engagement with a personalized financial plan that includes more than just investment recommendations. After all, your investments are just a piece of your overall financial picture.

Cathy Pareto and Associates is a Miami Financial Planner and Investment Management company serving the needs of clients throughout the state of Florida. Our company also helps clients in other states and in other countries.

## Be More than Just Another Account You Deserve More

One of the biggest complaints investors have about their current relationship with their [Financial Advisor](#) is that they feel like a number. They seldom get the personalized service or advice they deserve.

When you work with Cathy Pareto and Associates you will experience the difference it makes to have a well-rounded, knowledgeable, objective and experienced financial advisor on your side that truly understands you and cares about helping you meet your goals.

Learn more about [Our Services](#)



## Who We Serve



Individuals Planning For Retirement



Physicians &  
Dentists



Small Business  
Owners



Women



Modern Families



## Your Personal Financial Helpline

We do more than just create financial plans or invest your assets; we help you make better financial decisions. When you have questions related to insurance needs, buying versus leasing, saving, buying a home, investing, retirement or other, you can call us. We serve as your sounding board to help you make informed decisions that will impact your financial future. That's what makes our Advisors different. It's like having your own personal financial help-line.

We want to be there for you every step of the way to help you navigate the often complex life changes that will affect your financial future.

When you work with Cathy Pareto and Associates you will experience the difference it makes to have a knowledgeable Advisor who is truly your financial partner. We not only help you with your investments, we help you stay on target so you can live your life with peace of mind.

**Contact Us** today to find out how we can help you



## What You'll Experience

Objective Advice

Personalized Service

Knowledgeable Team

Fiduciary Standards

## From Our Blog



It May Be Time to Rollover Your Old Retirement Plan Into an IRA

New Job Old 401K?  
Consider a Rollover IRA

28  
MAY 2019



At some point or another in our lives, we have left a job to move on to another company. But too often, we forget to pack one our most important personal items in our moving... [Read More](#)



2019 Top Ranked Financial  
Advisory Firm

20  
MAY 2019



We are proud to announce that Cathy Pareto and Associates has been named as a 2019 top ranked financial advisory firm in Miami and Coral Gables by Advisory HQ. Our team of advisors and planners... [Read More](#)

## Connect



## Contact Us

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## Locate Us

