

## Talk to an Advisor GET ANSWERS

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## Is your nest egg prepared for major life events?

Disability

Death of spouse

Loss of job

Medical Emergency

All of the above

LIFE EVENTS

BUSINESS VS PERSONAL WEALTH

RETIREMENT DREAMS

FINANCIAL FUTURE

As featured on:

The Washington Post

CBS

BUSINESS JOURNAL

WALL STREET JOURNAL

abc

YAHOO!

## Investor Case Studies

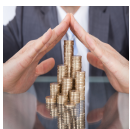


“We wanted to evaluate other investment strategies and compensation methods. We were getting tired of the fees that we were being charged. We don't want to get "nickel & dimed" to death with transaction and management fees. Thank you WiserAdvisor for helping us find our advisor!”

**Profile:** Gary is in his early 50s, married, corporate hardware and software manager in Minneapolis, MN. He enjoys personal investing and model airplanes / trains.

**Portfolio Size:** \$800K

## Financial Articles



### [What To Do If Your Employer Doesn't Offer a 401k Retirement Plan?](#)

Everyone knows the importance of saving for retirement. As a rule of thumb, the earlier you start saving, the better it is - thanks to the power of compound interest. Many financial experts' advice their clients to plan for their retirement right...

[Read more >](#)



### [7 Key Steps To Create A Good Estate Plan](#)

Estate planning is a wise thing to do to ensure that your family and loved ones are safe and at the same time save them from unnecessary stress and headaches during an extremely difficult time. A comprehensive estate plan is more than just the...

[Read more >](#)



### [What Does Per Stirpes And Per Capita Mean For Beneficiary Distributions In Estate Planning?](#)

Estate planning is a stressful process, but it is one of the necessary life steps which you need to take. When you start working with the attorney for estate planning, you will often hear some of these commonly used terms such as per stirpes and per...

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Finance and investments : Do It Yourself or Hire a Pro?

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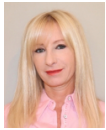


The Definitive Guide to selecting the right financial advisor for your needs.

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## Featured Financial Advisors



**[Hilary O'Malley, BFA®](#)**

Financial Advisor from Plymouth, MA

Comprehensive financial Planning focusing on a long term approach that helps our clients prepare for the future and the possibility of unforeseen events.

[Other Plymouth, MA Financial Advisors](#)



**[Glen McLaughlin](#)**

Financial Advisor from Huntersville, NC

Buoyant offers end-to-end, holistic financial management through a process that will grow, change, and flex as you and your financial situation evolve. We begin by establishing a relationship,...

[Other Huntersville, NC Financial Advisors](#)



**[Kurt Rozman](#)**

Financial Advisor from Brookfield, WI

The experienced professionals at Freedom Wealth Alliance can help provide clarity to your financial objectives and direction toward your goals. Our guidance is delivered with a level of integrity...

[Other Brookfield, WI Financial Advisors](#)



**[Richard Janke, CFP®](#)**

Financial Advisor from Salt Lake City, UT

The Financial Insight Center is a fee based Investment Advisory firm located in Salt Lake City Utah. Clients choose us for our customized approach to financial planning and wealth management. We...

[Other Salt Lake City, UT Financial Advisors](#)



**[Mark Sinderson, CFP®](#)**

Financial Advisor from Norcross, GA

Financial Clarity Partners helps people make the most of their life and their money. We are an independent financial planning firm that offers affordable financial planning and advice to anyone...

[Other Norcross, GA Financial Advisors](#)



**[Brian Joyce, CFP®/CPA](#)**

Financial Advisor from Loveland, CO

Brian is a fee-only advisor, meaning that he does not receive commissions on the financial plans or products he recommends. Without the conflict of interest that accompanies sales commissions,...

[Other Loveland, CO Financial Advisors](#)



**[Fisher Asset Management, LLC](#)**

Financial Advisor from Camas, WA

Fisher Investments is a privately owned, independent, fee-only Registered Investment Adviser that has helped investors achieve their financial goals for over 40 years. As of 3/31/2019, Fisher...

[Other Camas, WA Financial Advisors](#)



**[Kraig McFarland](#)**

Financial Advisor from Tulsa, OK

The first thing you can expect is a conversation about where you are and where you would like to be. We create a personal financial plan based upon your goals that will be our guide going forward. A...

[Other Tulsa, OK Financial Advisors](#)



**[Dominic Chavez](#)**

Financial Advisor from Santa Fe, NM

Since 1986, Edelman Financial Engines has been committed to always acting in the best interest of our clients. We were founded on the belief that all American investors - not just the wealthy -...

[Other Santa Fe, NM Financial Advisors](#)



**[James Albert CPFA®, CRPS®](#)**

Financial Advisor from Virginia Beach, VA

Many of our clients are referred to us by existing clients-- why? We believe it's because they know we genuinely care about them, demonstrate integrity and transparency and can be relied upon to...

[Other Virginia Beach, VA Financial Advisors](#)



**[Kevin Shea](#)**

Financial Advisor from Short Hills, NJ

Since 1986, Edelman Financial Engines has been committed to always acting in the best interest of our clients. We were founded on the belief that all American investors - not just the wealthy -...

[Other Short Hills, NJ Financial Advisors](#)

Top Financial Concerns

Advisor Compensation

Advisor Credentials



### Retirement & Healthcare

#### Retirement Changes: Health Care, Social Security, and Medicare in 2014

How much do you know about the three largest learning curves that most retirees must face? In dealing with health care costs, Social Security, and Medicare, there are hurdles that can entangle even the savviest retirement-planner, especially when it comes to tracking rules and yearly changes...[more](#)



### Saving & Investing

#### How do you choose an optimal combination of investments to help you reach a goal that may be decades away?

When faced with all the decisions that need to be made to ensure you select the proper investments to meet your long-term financial goals, it's easy to become overwhelmed. The answer is to focus on the fundamentals. Make sure to get these basics right...[more](#)



### Outliving Nest egg

#### Personal Assets and Investable Assets: New Retirement Income Trends.

As financial experts sound the warning bells about the American retirement planning crisis, and how little the average worker has saved toward his or her golden years, all kinds of questions abound -- what exactly do retiring workers have squirreled away to provide for them when they quit working...[more](#)



### Business to Personal

#### 5 Key Steps In Planning Your Business's Legacy

When you build a business, you're not simply fulfilling a vision while earning a living; you're also creating a legacy. Enter succession planning: the process of preparing to hand over your company to future leaders. Let's look at how you should start preparing for your company's future management...[more](#)

## Why Use WiserAdvisor



### Advisor Pre-Screening

All advisors have to meet strict screening criteria to be part of our network.



### No Conflict of Interest

WiserAdvisor is not a financial services company and does not offer any financial advice or products.



### No Cost

Our Advisor Match Service is free to consumers. Advisors do pay a fee, once they qualify, to be a part of our network.



### Confidential

We do not share your information with anyone other than the financial advisors are are matched to as per your requirements.



### No Obligation

You are not obligated to hire any financial advisor that is matched to you. We do however request you to interview all the advisors to check if they suit your financial situation.



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You will only talk to pre-screened financial advisors whose profile matches your financial needs.

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