

Woodward Financial Advisors

You have questions about life's most important financial decisions

You want to be confident about your financial security

You need a partner, not a product

WE CAN HELP

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Woodward Financial Advisors

WE ARE A WEALTH MANAGEMENT FIRM THAT EXISTS TO HELP YOU ACHIEVE YOUR DEFINITION OF FINANCIAL SUCCESS

These are some of our clients. Do they sound like you?



Financial Independence

John and Martha had a lot of questions about John's pending retirement from UNC-Chapel Hill, the best way to help their children start their careers, and if their portfolio was a good fit.

We asked questions, we listened, and we worked together to come up with a plan.



On Her Own

After her divorce, Jane was ready to retire to her house on the beach and start the next phase of her life. But she wanted to make sure that everything from her separation agreement had been worked

into her financial plan, and to figure out the best way to draw down her accounts.



Transitions

The transition from a hard-charging career into retirement isn't always easy, and the challenges can sometimes be more emotional than financial. That's where Sandy and Jay were when we met them.

We'd love to hear from you!

NAME

EMAIL

PHONE

HOW CAN WE HELP?

SEND

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