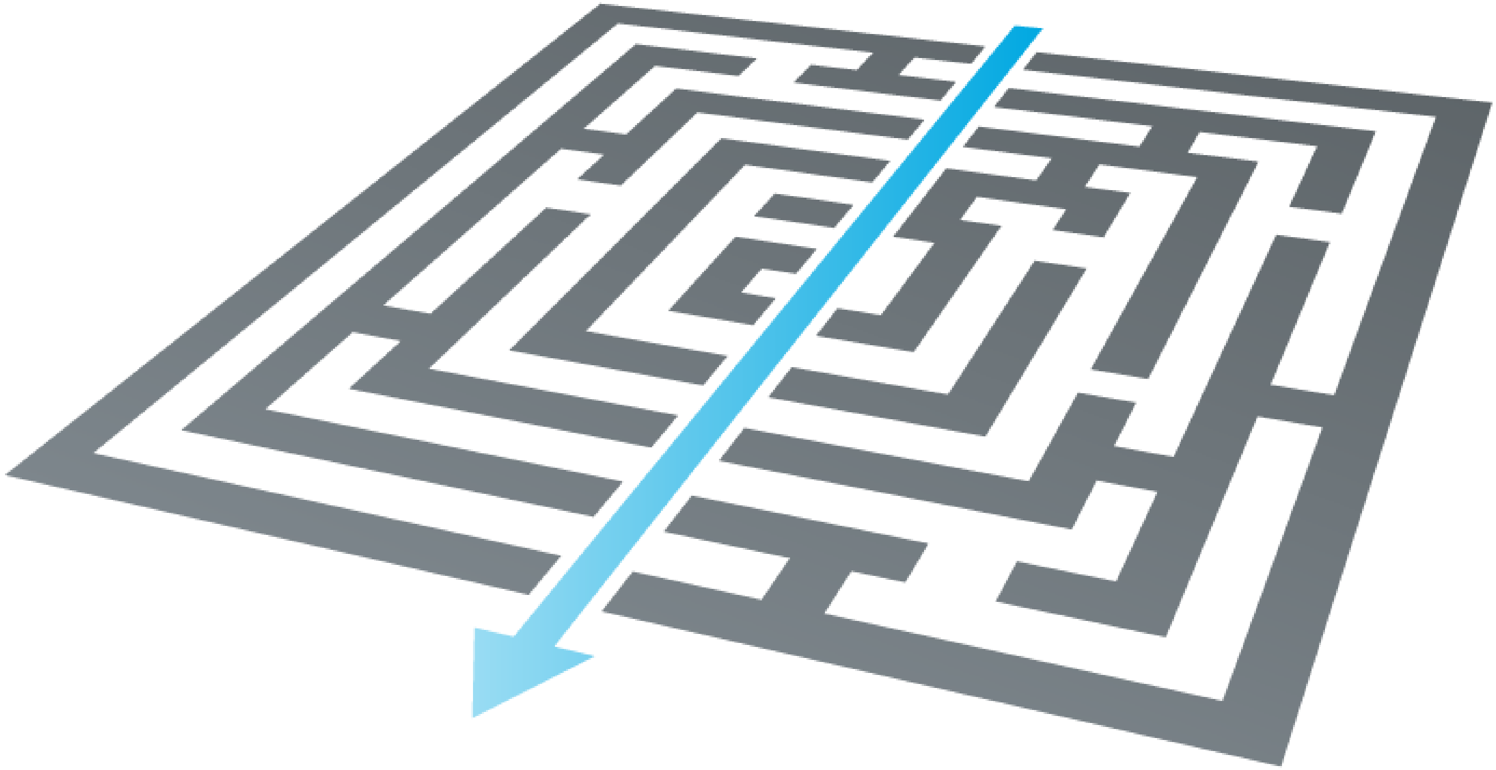

MONEY DOESN'T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you're not alone.

What makes us different

Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

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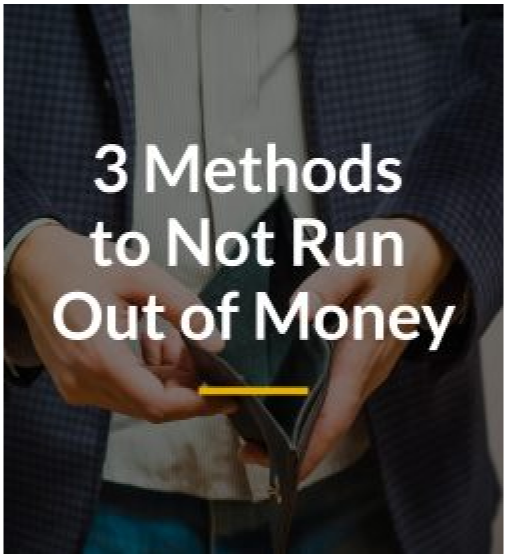
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BARRON'S HALL OF FAME

InvestmentNews ICONS & INNOVATORS

People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life, and your future.

At Equity Planning, we believe clients should underst
that is h

good about explaining investments as they are at mak

+ What are you going to do with my money?

+ Can you handle the complexity of my situation?

+ How can you make my life easier?

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

More than 8%

Next

How to get started.

1. Schedule an appointment

2. Meet with us for a custom listening session

3. Get your personalized strategy

Schedule an appointment | Watch video

Please provide your name and email and we will have an a

First Name*

Last Name*

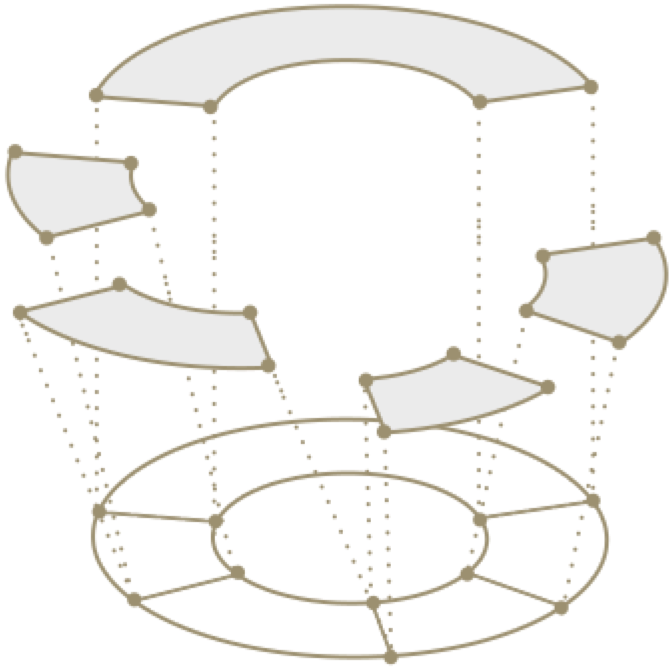
Email*

Phone Number*

Submit

Our financial planning services are built on trust, transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams. Explore services



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Equity Planning opened its doors in 1963 and since then, we have provided independent and comprehensive financial planning services to individuals, families, and business owners nationwide.

We serve a diverse client base spanning a multitude of industries, investment knowledge, passions, and priorities from our firm outside of Washington, DC in Bethesda, MD. Our wide range of clients includes medical professionals, contractors, business owners, corporate executives, government employees, and many other backgrounds.

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News

BUSTING THREE HALF-TRUTHS ABOUT REVER

A few years back, I conducted and published research in the *Planning* that showed Americans don’t understand reverse respondents scored below 50 percent on a 10-question

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Blog post

HOW TO BUY A CAR WITHOUT LOSING YOUR MIND (OR YOUR WALLET)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It’s painful and annoying, I know I have to deal with it, but it’s going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

Read more

Weekly Market Commentary

WEEKLY MARKET COMMENTARY – JULY 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

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Follow Us

Headquarters

7910 Woodmont Ave.
Suite 900
Bethesda, MD 20814
Direct: (301) 652-8702
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