



The JL Smith Group
Tax & Wealth Advisors

Call (440) 934-9181



The Value of a Holistic Advisor

A holistic advisor is a comprehensive advisor that looks at the big financial picture and provides advice that takes all areas of planning into consideration. **Watch the video below to learn more!**

The Value of a Holistic Advisor



YOUR RETIREMENT. YOUR WAY.

Bringing holistic financial planning services to families at or near retirement.

The road leading to your financial independence in retirement can be a bumpy one. Proper navigation is critical to reaching your ultimate destination – a secure and well-coordinated retirement.

At The JL Smith Group, our team takes the holistic approach to financial planning. We try to help maximize your life-savings to accomplish your unique retirement goals by coordinating all critical areas of your financial life, including:

- Investments
- Insurance
- Tax planning & preparation
- Social Security strategies
- Medicare
- Estate planning

Click here to learn more about The JL Smith Group. For a complimentary consultation contact us or call now at (440) 934-9181.



WHITE PAPER DOWNLOAD

With uncertain markets, low interest rates & increased volatility, where can retirees invest today?

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