



CREATING, PROTECTING, PRESERVING

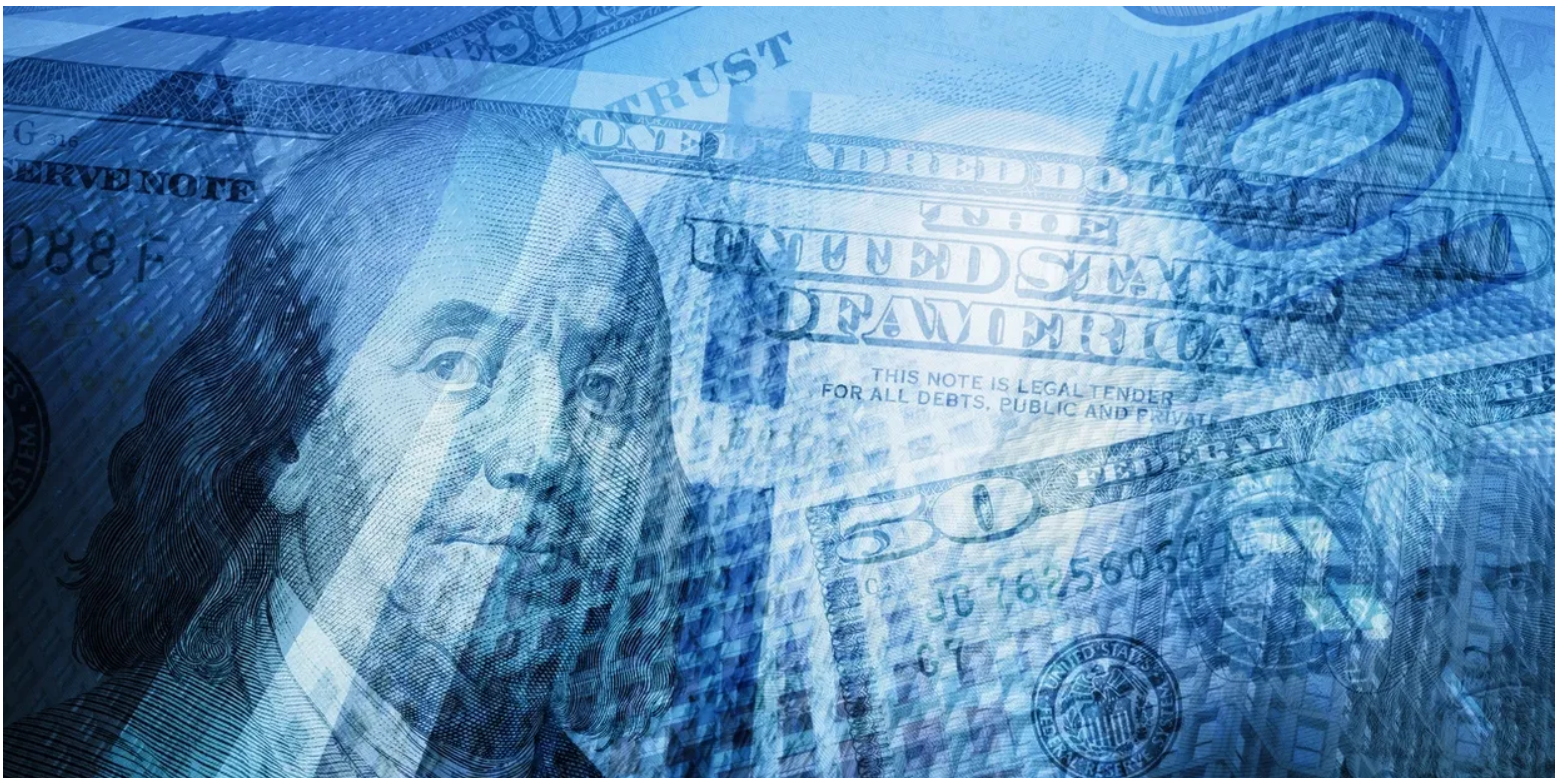
(863) 385-1101

FINANCIAL SERVICES THAT MAKE YOUR FUTURE A SUCCESS

Plan for tomorrow today!

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ABOUT US



Planning Futures

We have years of experience helping clients prepare for the unknown while meeting their financial goals. Ask us about:

- Financial planning
- Investment advice
- Retirement planning
- Education funding
- Estate planning

As an independent financial services firm, we can access many different products so you can get the right products and services for you.



Comprehensive Approach

We use proven finance strategies designed to meet your risk tolerance and stand up against market volatility. And you can count on unbiased recommendations and impartial guidance based directly on your needs and goals.



Committed to Service

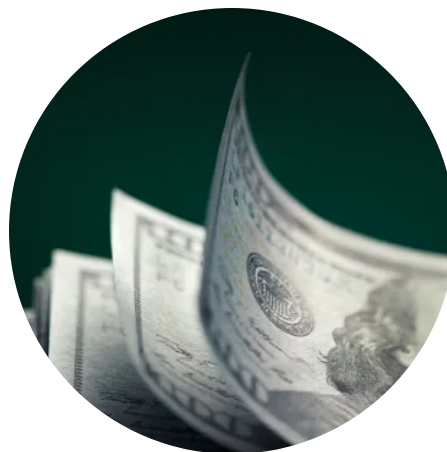
Every successful financial strategy starts with an excellent client relationship. Our mission and values include exceeding our client's every expectation. Call us today to find out how we can suggest long- and short-term strategies that will help you realize your financial dreams.

OUR TEAM



Financial Planner #1

Jennifer began her finance career in April 1999 at Ruman Limited Partners. In November of 1992, she left RLP and started her sales career as an agent with S&H Ltd.



Financial Planner #2

Jane began her finance career in April 1997 at Soresen Limited Partners. In November of 1992, she left Sorenson and started her sales career as an agent with S&H Ltd.



Financial Planner #3

Jeff began his finance career in April 2010 at Gage Ltd. In November of 1992, Jeff left Gage and started his sales career as an agent with S&H Ltd.

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Hours

Monday - Friday: 10am - 5pm

Saturday: By appointment

Sunday: Closed

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