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LPL Financial | John Mitchell, CFP®

(405) 348-3236

Aligning family values with financial decisions and goals.

Your choice for Financial Services

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Your Financial Future

Life is full of challenges. Business responsibilities, family issues, social and community efforts all compete for your time, talent and money. In today's world, managing your wealth demands that we be clear about our goals and requires knowledge, clarity and objectivity. I can help simplify the process of managing your wealth, freeing you to focus on the people, projects and passions you love. Using a unique consultative and engaging process, I help clients discover, define, and prioritize their family's values before we begin discussing their finances.

As an independent financial advisor, my interests are always aligned with the interest of my clients' - I listen and strive to understand what you want for your family. Serving a select number of individuals and families, my mission is to help my clients identify and align their personal values with their financial decisions and goals.

My deep commitment to my clients is defined by three core principles:

Holistic Family Focus

Clients feel more connected to what they value most, knowing that they have an advisor committed to building stronger families.

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Values-Based Planning

Clients feel more focused on their ability to build lasting success from a foundation of shared and practiced values.

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Tailored Attention

Clients feel more at ease knowing that a professional is at their disposal to help them connect their wealth to their family’s values.

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Comprehensive Financial Planning

I offer comprehensive financial planning helping you to address your financial needs in the context of your values. Whether you are an individual dealing with one of life’s transitions, a business owner exploring succession planning, a retiring executive, or someone who has just lost a loved one, we can help you make these important decisions.

By developing a financial plan to address your unique needs, we create a roadmap for the coordination and implementation of recommendations, aligned with your values.

Through ongoing, proactive communication and accountability throughout the relationship, I help to educate my clients to make sound decisions, connecting their finances to their family values.

Have a Question?

Name

Email

Message

SEND

Contact

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