PLANNING WITH PURPOSE

Guiding you on your journey to a meaningful financial future

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HI, I'M PAUL ROGERS

Welcome to Mindful Wealth Management. As a CERTIFIED FINANCIAL PLANNER™ professional and retirement options coach, I help pre-retirees and retirees transition smoothly and confidently into a new stage of life.

GET STARTED

MEANINGFUL ADVICE ROOTED IN YOUR NEEDS

PERSONALIZED

Planning for and living in retirement means more than just making good financial choices, it's also about being fully invested in living a satisfying and meaningful life. We work closely with you to ensure our advice is focused on your individual situation and life goals.

HOLISTIC

Your resources should be managed to support your life, not the other way around. In addition to financial planning and investment management, we offer retirement coaching to help you gain a greater awareness of the many facets involved in this major milestone.

COMPREHENSIVE

We're in this for the long-haul, guiding you on your journey and empowering you in your financial choices. We'll help clear the path toward a smooth retirement transition so you can focus on the things that really matter. Let us take care of the money while you get out there and enjoy your life.

When your finances are aligned with your goals, you can move forward with confidence. We take the time to really understand what's important to you and structure your finances to support your life.

LEARN MORE

TAKING A MINDFUL APPROACH TO YOUR FINANCIAL LIFE

We use the term "mindful" because it perfectly encapsulates our approach to financial planning, investment management and, most importantly, life. It means really thinking about your purpose and goals in life and using the wealth you have accumulated to support them. It means finding the balance between planning for the future and living in the now. By thoughtfully and prudently managing your resources, we can help support you in leading a life of meaning and vitality.

LEARN HOW

There is no wealth but life.

– John Ruskin

GROWING WITH YOU

We approach your financial situation with a genuine desire to help you live your best life. We'll get the right foundation in place and then, because we know life doesn't always go according to plan, we'll adjust things as your life evolves. With Mindful Wealth Management as your trusted partner, you can focus on your life, not numbers.

LEARN MORE

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LEARN MORE

LATEST FROM THE FIELD

START INVESTING ON PRINCIPLES, NOT PREDICTIONS

WHAT DOES RETIREMENT REALLY LOOK LIKE IN TODAY'S WORLD?

READ MORE

READY TO PLAN MORE MINDFULLY?

START YOUR JOURNEY

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START YOUR JOURNEY

LOCATION

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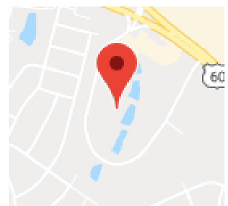

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