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CREATING A FINANCIAL PLAN FOR Financial Freedom

[Learn More \(/about\)](#)

Learn more about becoming a client and see some commonly asked questions.
[\(/faqs\)](#)

Murphy & Sylvest

FINANCIAL PLANNING FOR THE GOOD LIFE

Our Philosophy

Financial Planning for the Good Life involves balancing needs for today with achieving dreams in the future. We are a full service and fee based financial planning firm with over 50 years of experience helping clients make smart decisions to reach their financial goals. We establish long-term client relationships based on

trust and superior service. We advise our clients on a range of issues from basic to complex including financial independence, education funding, retirement, estate planning, trusts, charitable entities, and business planning and succession.

As an Independent Registered Investment Advisory firm, Murphy & Sylvest has a fiduciary obligation to serve the best interests of our clients. Our clients are always our first priority.

Financial Planning (/financial-planning)

Assistance in organizing your personal and financial affairs into a coherent picture; followed by a comprehensive evaluation of your current and future financial state to predict future cash flows, asset values and withdrawal plans. These elements are delivered to you in the form of a living plan for your financial future.

Investment Management (/investment-management)

Develop and invest in a portfolio which has been developed to meet your specific time horizon and risk tolerance.

Wealth Management (/wealth-management)

After listening to your goals, we provide a high-level professional service which combines financial/investment advice, retirement, philanthropic and legal/estate planning. We coordinate input from your other experts such as your attorney, accountant and insurance agent.



Looking to learn more?

Get in touch today

[Contact Us \(/contact\)](/contact)



Additional info

[Sitemap \(/sitemap\)](/sitemap)

[Legal, privacy, copyright and trademark information \(/legal-privacy-copyright-and-trademark-information\)](/legal-privacy-copyright-and-trademark-information)

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