

T O D D Y
& ASSOCIATES

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☎ 1-800-940-0469

How We Work

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of our foundation of success.



Our Process

We create strategies that are tailored to your needs and goals.



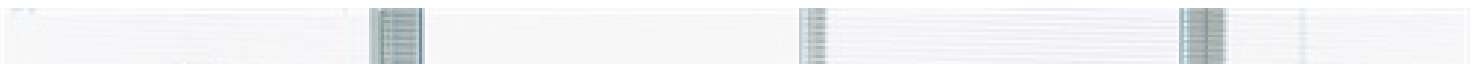
Our History

Years of experience have prepared us to guide you through your life transitions.



Our Values

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.





Our Resources

Want to learn more about retirement, social security, or estate strategies? We have a wealth of resources.

Client Relationships Are Our Top Priority

"Our mission is simple: To learn more about you, understand your needs, wants, and goals. My team will help you identify the personal financial strategies aimed at improving your lifestyle today and providing the foundation for a sound retirement in the years to come.

We understand today's financial environment, having been in the industry since 1994. We also understand that individuals face unique challenges and have unique financial histories. We look forward to working with you and taking the mystery out of preparing for today and tomorrow."



Have a Question

Name

Email

Phone

Question

SEND

How Much do You Know About Investment?

These days, investing in financial markets is a common practice. Yet, many Americans remain under informed about how various investment products really work. Want to know how you rank? Challenge yourself with our brief quiz, "Test Your Investment IQ."

First Name

Last Name

Email

TAKE THE QUIZ

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