COMPREHENSIVE FINANCIAL GUIDANCE

WITH PERSONALIZED SERVICE

OUR SERVICES

The LeBlanc Wealth Management Team at LPL Financial specializes in retirement planning for both individuals and businesses, offering the guidance and investment solutions to help clients achieve their goals.

RETIREMENT PLANNING

Advanced planning for retirement is crucial. Our Financial Planners will work with you to develop a personalized Action Plan before you retire to ensure that certain procedures and strategies are carried out ahead of time.

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ESTATE PLANNING

Developing an estate plan guarantees that the maximum amount of your estate will go to your beneficiaries, rather than into someone else's hands. It also aims to maintain flexibility for the initiating party prior to death. This process is the foundation of generational wealth.

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INVESTMENT PLANNING

We will develop a strategic investment plan by considering risk tolerance, time horizon, liquidity, and income requirements. Your plan will be flexible enough to adjust with the changing market.

[READ MORE]

OUR MISSION & PROCESS

LeBlanc Wealth Management is a comprehensive financial services firm committed to helping our clients improve their long-term financial independence. Our customized programs are designed to grow and conserve our clients' wealth while delivering an unprecedented level of personalized service.

Let us make your money work for YOU!

Step 1 - Retirement Plan: Don't wait until you're ready to retire to start planning! We'll work closely with you to get everything into place and discuss methods of investing your personal savings so you're ready when the time comes.

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Step 2 - Estate Plan: Step 2 focuses on ensuring beneficiaries receive the maximum amount of wealth possible while still providing flexibility for estate owners prior to death.

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Step 3 - Investment Plan: In Step 3, we implement an investment plan based on several market factors. Investment plans must be flexible enough to be strategically revised with market fluctuations.

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Step 4 - Review Process: Wealth management is an ongoing process and should recognize changes in economics, legislation or family dynamics, which can affect financial goals. We meet with our clients on an agreed-upon schedule either quarterly, semi-annually or annually to review retirement, estate and investment plans.

[READ MORE]

IMAGE COMING SOON

OUR TEAM

Seasoned professionals ready to help you with all aspects of wealth management.

RYAN LEBLANC

Financial Advisor

SAMANTHA FEDRICK

Account / Operations Manager

CONTACT US

Let's get started planning your future! Our office can be reached via the form below, or scroll down for our phone number. We look forward to hearing from you.

Your Name *

Your Email *

Your Phone Number: *

Your Message *

SEND MESSAGE

Phone: (504) 305-2080
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