Ron Coite & Associates (https://www.roncoite.com/)

FINANCIAL GUIDANCE

We offer personalized plans to match your needs. No matter where you are in your financial journey, we endeavor to take you to the next level. From college planning to retirement savings, we'll give you confidence in your financial future.

WEALTH MANAGEMENT

You've worked hard to get here. Helping you grow your wealth requires patience and foresight. We have the specialized knowledge needed to help protect and grow your assets.

LEGACY AND ESTATE PLANNING

Your estate and trust planning deserve careful attention. We will help ensure your values are upheld as we affirm your legacy for both you and your loved ones.

INSURANCE SERVICES

A good defense is the best offense. We offer sound guidance on life, disability and health insurance, while coordinating Medicare with supplemental health. Additionally, we offer our comprehensive tax services expertise.

Our Financial Advisement Process

Establishing Relationship: It all starts with trust. Our strongest relationships have lasted since we founded Ron Coite & Associates, and that level of trust has given our clientele great confidence in working with us.

Gathering Data and Goals: Preparation brings our most enduring success. It is important to understand your objectives so we can work to attain them. The principals at Ron Coite & Associates encourage an honest dialogue between client and advisor to help meet expectations.

Evaluating Financial Status: A thorough evaluation of your current fiscal position is essential as we develop a comprehensive financial plan to assist you in achieving your goals.

Review Our Recommendations: All of our proposals are dependent upon your review and endorsement. We are committed to ensuring your understanding of all aspects of our recommendations.

Setting Your Plan to Action: When our financial plans meet your needs, we will begin to implement them. This is an exciting part of the process that offers long-term results.

Monitoring Portfolio Progress: We relish the opportunity to track your portfolio progress and fine-tune plans along the way by meeting with you on a semi- annual basis or as frequently as needed.

Your Goals Are Our Top Priority Yesterday, Today and Tomorrow

We understand that the most important financial matters rarely happen on a 9 to 5 schedule. Our associates are always ready to help. Dedicated solely to our clients, we provide customized solutions from a wide array of companies as we protect, grow and preserve your wealth.

Individuals & Families

Whether you are single or are growing a family, Ron Coite & Associates customizes your investment strategies to fit your current needs and future goals. In an era of rising education costs and shrinking social security benefits, we can solidify tomorrow by planning today.

(https://www.roncoite.

Business Owners

We believe small businesses are the backbone of America and we do our utmost to help your business thrive. Besides managing your investments, Ron Coite & Associates can manage your company's 401k program. Our benefit strategies will leave you and your employees with the confidence they deserve.

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Check the background of your financial professional on FINRA's BrokerCheck (//brokercheck.finra.org/).

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Investing involves risk, including the possible loss of principal invested.

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