



ELLEN DORLE | CFP[®]

Creating plans for your financial future.

☎ 614-880-0064

Your Agenda | Your Goals | Your Plan

Personalized Financial Services

LEARN MORE



Your Agenda

There's a reason you've found your way to this spot. And that's the beginning of *your* agenda. Can you think of a better spot to begin?

WHAT ARE YOUR QUESTIONS?



Your Goals

Your questions are the starting point and we build *your* goals from there. Open your mind, and explore all the things you might like to accomplish. Together we make a list of *your* goals, as long a list as you'd like to make it.

WHAT ARE YOUR GOALS?



Your Plan

Once we layout your goals and the facts of your situation, we can begin to build *your* plan. You're taking the things you want to do with your life and matching them with the facts of your life. This may be one of the more empowering things you can do.

WHAT'S NEXT IS UP TO YOU.



Understanding Today's Financial Environment

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement – or looking to better understand certain investment ideas – we can help you address your most pressing financial questions.

At some point in your life, you'll find yourself in a period of change. Transitions are very personal and whether they are big or small, it is an important event in your life.

Ellen Dorle, CFP® specializes in working side by side with clients to help manage the financial and emotional components of their transitions. When you need answers, Ellen will be your advocate during this time of change.

She will support you through this process and work together with you, to create a plan for your financial future.

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To request your complimentary consultation today, please call Ellen at 614-880-0064 or send a request below.

Name

Email

Message

SEND

Contact

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