



75 Gilcreast Rd., Ste 304
Londonderry, NH 03053

Phone:

603-505-4922

Fax:

Insurance

A sound insurance program can help protect your family from the financial consequences of unexpected events.

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Retirement

Where will your retirement money come from? A sound approach involves closely looking at potential retirement-income sources.

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Contact Us

Please feel free to contact us with any questions.

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WHY CHOOSE A CFP® PROFESSIONAL?

Most people think all financial planners and financial advisors are “certified”, but this isn't true. Anyone with a basic securities or insurance license can put Financial Advisor on their business card. Only those who have fulfilled the certification and renewal requirements of the CFP® Board can display the CFP® certification trademarks which represent a high level of competency, ethics, and professionalism. And because they are held to a fiduciary standard of care, a CFP® Professional is required to act in your best interest.

Why choose Symmetry Wealth Management?

- We help you create your Plan based on your goals and values. How does this help you?
 - This helps you understand if you are on track for your goals of retiring with enough funds to support your lifestyle, or if you have enough saved for your child's college education or even shorter term goals like building an adequate emergency fund?

- Having a plan can make you feel more secure that you are on track to the financial future that you dream of.
- We help you create a balanced portfolio with both targeted risk management and active portfolio management.
 - By creating a customized portfolio just for you which we are actively managing through changing markets – we help you feel less fearful about market conditions and reaching your goals.
- We spend the time with you to get to know you and ask questions to get a clear understanding of your goals and values.
 - We want to build a long term relationship with you – so getting to know you and what is important to you and your family is the best way we know to do this. This long term relationship builds the trust that allows you to worry less about your assets after all, that is what we do for you every day!

If this sounds like what you have been looking for or even if you just want to explore more about who we are and what we can do for you, call or email us today to set up our initial conversation to make sure we are a good fit for each other.



Symmetry Wealth Management, Inc. offers Investment Advisory services through Prosperity Wealth Management, Inc. Securities offered through Fortune Financial Services, Inc, Member **FINRA** and **SIPC**.

Symmetry Wealth Management Inc., Prosperity Wealth Management, Inc. & Fortune Financial Services, Inc. are separate entities.

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