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*and even his  
worst enemy -  
is likely to be  
himself.*

- Benjamin Graham



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We believe that working with a CERTIFIED FINANCIAL PLANNER™ affords our clients the highest level of competency, ethics and professionalism in the industry. The CFP® professional puts the client's interest first, providing financial planning services only in the best interest of the client - a "fiduciary" standard.



## Wealth E-Organizer

Helping clients organize their financial life with a customized digital wealth management portal: A dynamic offering that consolidates assets, tracks cash-flow, spending and savings, and providing online workshops, videos, and articles to educate how important financial decisions will impact their future.

## Blog

### [Avoiding Retirement Woes \(/blog\\_01/avoiding-retirement-woes-0\)](/blog_01/avoiding-retirement-woes-0)

By Keith A. Rhodus on Apr 22, 2019

#### **How to Avoid Retirement Woes**

According to the American Institute of CPAs (AICPA), the top concern of retirees is running out of money. While it's a known fact that many of us don't begin to save for retirement when we should, it appears that nearly half of all current retirees are concerned about outliving their retirement funds. However, there are some things you can do now to help mitigate the very real risk of outliving your retirement funds. These include the following:

[Read More \(/blog\\_01/avoiding-retirement-woes-0\)](/blog_01/avoiding-retirement-woes-0)



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## [Finance Cost of Owning a Pet \(/blog\\_01/finance-cost-owning-pet-0\)](/blog_01/finance-cost-owning-pet-0)

By Keith A. Rhodus on Apr 15, 2019

Has a dog or cat grabbed hold of your heart? It doesn't take much. A paw on the arm. A lick on the nose, or a soft purr or whimper can turn most of us into dog or cat parents in minutes. With animal shelters across the U.S. frequently at their max, there are a record number of dogs and cats available for adoption.

[Read More \(/blog\\_01/finance-cost-owning-pet-0\)](/blog_01/finance-cost-owning-pet-0)



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## [How to Start Investing \(/blog\\_01/how-start-investing-0\)](/blog_01/how-start-investing-0)

By Keith A. Rhodus on Apr 8, 2019

If you're interested in beginning to invest but are nervous, or simply don't have a lot of money to invest, why not start slow?

There are a multitude of ways to get started without risking a lot of money in the process. If you have \$1,000 and are ready to start investing, here are some ways to do so:

[Read More \(/blog\\_01/how-start-investing-0\)](/blog_01/how-start-investing-0)

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