



PERSPECTIVE  
WEALTH PLANNING



# Investing Reimagined for Life & Retirement

## Our Committed Approach

The foundation of **Perspective Wealth Planning** is built upon two pillars: active asset management and outstanding customer service. Our in-house active management philosophy allows us to navigate through the ever-changing market conditions. Your customer service experience revolves around constant communication; weekly market updates, quarterly reviews, and annual updates to your personalized financial plan.

## Our Services

Here at **Perspective Wealth Planning**, we are a Comprehensive Financial Services Office. We offer in-house asset management to take care of your investing needs. We also focus on financial planning for everyone; whether you are just starting to plan for your future, approaching retirement, in retirement, or looking towards estate planning. We also have access to a full range of insurance solutions to help protect all of the things that are important to you. Click below to find out more about each of these services!



Asset Management



Financial Planning



Retirement



Insurance

## Who We Are

Our office is located in Richland Township in Johnstown, PA ([https://en.wikipedia.org/wiki/Johnstown,\\_Pennsylvania](https://en.wikipedia.org/wiki/Johnstown,_Pennsylvania)). If you aren't located close to our office, we work virtually with clients all over the US. Click "Our Team" below to learn more about our office. Click "Our Content" below to check out our weekly market updates, educational content, and blogs.



Our Team

([/our-team](#))



Our Content

([/videos-and-](#)

Check the background of investment professionals associated with this site on FINRA's Broker Check (<https://brokercheck.finra.org/>)

[CLICK HERE TO TALK TO US ABOUT OUR SERVICES \(/CONTACT-US\)](#)

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