

At DSM Financial, our goal is to provide an efficient and cost-effective approach to financial planning. We look at your financial picture macro vs. micro. We find that people buy financial products throughout their life that are not integrated or coordinated with other products.

We put the products together to see how they are working for or against other products in your portfolio. We take a look at your homeowner's policies, car insurance, health insurance, life insurance, group insurance, savings accounts, 529s, 401(k)s, Roth IRAs, company stocks, all the way down to your mortgage. We meet with our clients a couple times a year, or whenever there is a change in their financial world.

DSM Financial is here to tailor strategies specifically designed to address your retirement goals.

Download your COMPLIMENTARY *"10 Steps to a Successful Retirement"* guide today!



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