Join Webinar (888) 336-8402

Clear Financial Advice

Retire

Invest

Get Insurance

Discuss Taxes

Pay off Debt

At COPE CORRALES we know you want to be clear and confident around your finances. In order to do that you need proven financial advice. The problem is most financial advice is confusing which leaves you feeling overwhelmed and unable to move forward. We believe someone should be able to explain things in terms you understand. Which is why we've developed a planning process that has worked to empower over 800 families in getting clear and confident about their money.

Are You?

- ✓ Overwhelmed with financial opinions?
- ✓ Weary of financial jargon?
- ✓ Consulting multiple advisors?
- ✓ Missing out on financial opportunities?
- ✓ Curious how the wealthy manage their money?
- ✓ Alone in your success?
- ✓ Tired of being sold and just want good advice?
- ✓ Unsure about Retirement?

Watch Video

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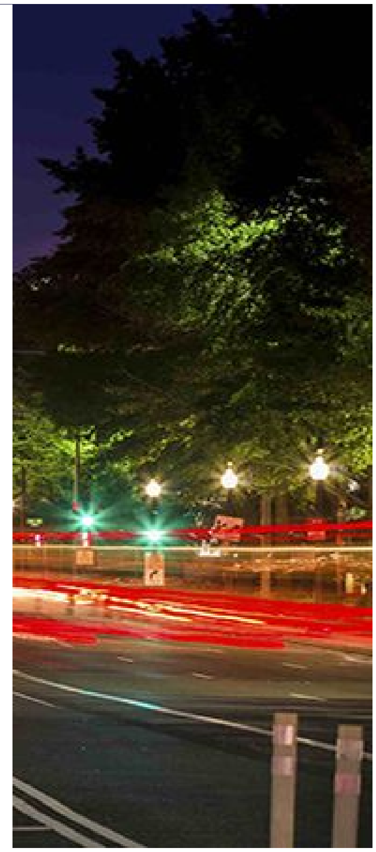

Dentists

As a Dentist we know you wear the hats of both practitioner and business person.

We want you to be great at both. So we'll help you with the business and money side of things – things like saving for retirement, investing, repaying student loans, even buying or selling your practice. And if we don't do it, we know the best professional who does. You get to serve patients, spend more time with family and live the life you dreamt of all the way back in dental school. So whether you are just beginning practice or want out yesterday – let's schedule a meeting and make dreams reality. Check out our Student Loan Repayment Page.

SCHEDULE APPOINTMENT

back to top

Medical Doctors

Medicine is a calling.

You spent years in training; when others were earning high incomes you were earning a resident's salary. Your pay now reflects your hard work and sacrifice. You're also getting started on saving a little later than most. We make sure your money works for you so you can enjoy your life and build a secure retirement. So let's schedule a meeting and begin to maximize all that hard work. Check out our Student Loan Repayment Page.

SCHEDULE APPOINTMENT

back to top

Business Owners

You've dedicated thousands of hours, and sleepless nights to ensure that your business succeeds.

You'd like to pay less in taxes, and feel like you may work forever with no end in sight. Or worst yet, you shut the lights off one day (*without a buyer*) without monetizing the value of the business. You may have also received conflicting advice from various professionals or people you trust (accountants, attorneys, insurance people, stock brokers, your brother in law). You deserve an advisor that can coordinate and integrate all the pieces of your business and personal financial life. So let's schedule a meeting - together we can help put your mind at ease, and develop a comprehensive plan that puts you back in the driver's seat.

SCHEDULE APPOINTMENT

back to top

Real Estate Professionals

We believe in real estate.

It's a tangible asset with many benefits – tax advantages, income stream for retirement, appreciation, and leveraging opportunities. However, with many of those advantages comes a big unknown – the real estate cycle. It's inevitable, and we'll help you prepare. We'll listen to you, and learn what your long term interests are. Whether its cash on cash returns, or partnering with your accountant, we understand the moving parts of real estate. So schedule a meeting, so that you can stop letting the market take advantage of you, and you can start taking advantage of the market.

SCHEDULE APPOINTMENT

back to top

Corporate Executives & Partners

You're likely grinding out long hours and pushing for that next level position.

You may also be receiving incentive based compensation – bonuses, restricted shares, incentive stock options. We understand your world, and we can help. We work with many Fortune 500 companies and firms and understand compensation packages, employee benefits, and retention plans. We also understand that you are on your own when it comes to planning for retirement – pensions are often long gone, a benefit of the past. Let's create a plan to put you back in control of your financial future, and capitalize on all your efforts in the corporate world – making work not a requirement, but a choice!

SCHEDULE APPOINTMENT

back to top

I WANT TO:

I WANT TO:

RETIRE

We plan because we believe you were born to do more than just work.

We take an uncommon approach when it comes to retirement planning. Instead of focusing on your “number” or how much money you should have at a certain age, we focus on monthly income. That’s the bottom line, and that’s how we most often pay our bills – monthly. We call that needing a steady “paycheck” in retirement to cover your basic needs. Above that, we help you create a “paycheck” so that you can have fun even when you are retired. So let’s schedule a meeting and spend some time together and we’ll see how these strategies can help you!

SCHEDULE APPOINTMENT

back to top

I WANT TO:

INVEST

So many of the financial planning professionals focus on the perspective that they have the answer in growing your assets.

Passive vs. Active vs. Robo types of investing are all "solutions" and yet there is not a clear consensus on what is best for you and your life. We will focus on educating you around the various ways that monies can be invested so that you can rest easy knowing that your assets are working the way you want them to while you continue growing personally and professionally.

SCHEDULE APPOINTMENT

back to top

I WANT TO:

Get Insurance

Your insurance should be simple, comprehensive and cost effective.

You should know your options and pick the plan that’s right for you. Be it disability, life or malpractice insurance we structure plans that protect your business, income and family – but here’s our crazy idea – your insurance should make you feel better AND grow your wealth. Let’s schedule a time to discuss your options.

REQUEST QUOTE

back to top

I WANT TO:

Discuss Taxes

As the saying goes, "death and taxes – the two inevitables."

We can help you plan for both. The IRS will likely be your life's biggest partner. Between income, real estate, capital gains, excise and self-employment tax, we'll partner with your CPA to address any and all options to manage your taxable burden and help you keep more of what you earn.

SCHEDULE APPOINTMENT

back to top

I WANT TO:

PAY OFF DEBT

Student Loans can be overwhelming.

The interest rates are high and payments can be daunting. We'll create a plan to pay back your loans in a

predictable and steady manner that gets you out of debt while enjoying your life. Common questions we help answer are: Should I consolidate? Should I refinance with a private lender? Do I pay back quickly or slowly? What about loan forgiveness?
Please visit our Student Loan page for calculators and more guidance. Then schedule an appointment and we'll create a plan tailored just for you.

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Please Review
IMPORTANT DISCLOSURES
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