# John Lian, CLU®, AIF®

Account Access

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***Helping families and business owners gain control of their financial challenges.***

Building strong client relationships is the foundation of my approach, and I have more than 15 years of combined experience helping people of means pursue their financial and wealth management goals. I am committed to earning your trust by offering candid financial advice and pro-active investment guidance.

Many clients that I work with have begun, or are preparing for, a new stage of life – retirement. They come to me seeking strategies designed with the goal to preserve their wealth and help provide an income stream that will enable them to realize lifelong goals and dreams. I am pleased that several relationships I have established span two or three generations of the same family.

I realize that no two clients are alike, even though they may share similar concerns. That is exactly why I take the time to learn who you are, what's important to you and what you want to accomplish with your wealth – for yourself and future generations.

Again, I appreciate your trust and desire to work with me.

I look forward to collaborating with you in the coming months and years to help you pursue your financial goals.

Planning for you and yours,

*John Lian*

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