

BRINGING YOUR PAST, PRESENT, AND FUTURE TOGETHER TO CREATE YOUR LEGACY.

OUR CORE VALUES

Comprehensive Financial Planning is the epicenter of how we work with our clients to achieve the goals they choose, with an emphasis on our three core values:

Retirement Planning

- Accumulating wealth for retirement
- Retirement income strategies utilizing our proprietary **T.E.R.M (Tax Efficient Retirement Modeling)** software

Legacy Planning

- Guardian, Custodian, Letters of Instruction
- Providing for the people you care about

Community Engagement

- We devote most of our time and resources to a limited number of organizations so that we can make a more substantial impact.
 - Junior Achievement (www.jacols.org)
 - Dress for Success (www.columbus.dressforsuccess.org)
 - Ohio University College of Business (www.business.ohio.edu)
 - Design Outreach (www.doutreach.org)

We support many other charities on a more limited basis either monetarily or by volunteering our time.

OUR MISSION:

To assist people, who seek to make knowledgeable decisions about their goals, pursue their personal dreams through ongoing financial planning.

OUR VISION:

To be one of the most respected, successful and recognized financial planning practices in Columbus, in Ohio and in the U.S.

OUR VALUE PROPOSITION:

To help clients and their families protect their legacy and lifestyle with flexibility, both now and in the future.

By enhancing your relationship with us on a continual basis through open communication, increasing our knowledge, engaging in individualized guidance, and providing the high level of service you deserve.

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