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LONGVIEW FINANCIAL ADVISORS

# Planning + Investing

A measured approach.

Longview Financial Advisors helps clients create long term strategies through a combination of financial planning and investment management.

In today's rapidly evolving financial landscape, understanding risks and opportunities can be a complex and time-consuming process — demands that many people find difficult to manage alone. Longview takes away that burden and the anxiety of questioning one's own financial decisions.

With more than 30 years of financial experience, we provide clients with comprehensive planning and investing strategies using academic research and low cost funds. As a trusted advisor, our transparent systems and reporting methods help you plan towards meeting your long-term financial goals.

[MORE ABOUT US \(/ABOUT\)](#)

## Our services.

We focus on planning and investing.

**Financial Planning** –  
working together to build  
a financial roadmap to  
the future

- Retirement Planning
- Education Planning
- Insurance Planning
- Tax Planning
- Stock Compensation Planning
- Employee Benefit Planning
- Social Security and Medicare Planning

**Investment Management** –  
intelligent, disciplined  
approach to managing  
your money

- Evidence Based Approach
- Asset Allocation
- Dynamic Rebalancing
- Tax Efficient Management
- Sustainability and Ethical Impact

- Estate Planning

Investing

- 401(k) Plans
- Managing Trusts and Inheritances

# Our clients.

We enjoy long-term relationships with professionals and their families seeking to plan for education and retirement funding. We also work with retired individuals and couples to provide a stream of retirement income. Our minimum account balance is \$2M.



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*Disclosure: Information on this website is from sources believed to be reliable. None of what is posted here is to be construed as investment advice nor is it a recommendation to buy or sell securities. Longview Financial Advisors encourages consumers of financial services to remain engaged when receiving financial advice. Past performance is not an indicator of future results.*

