hello.

Experienced. Professional. Unique.

In a world where financial professionals struggle to define themselves and add value to clients, we are just the opposite

We know exactly where and how we can add value to your business and personal financial life.

The role of the Financial Advisor is quickly moving from products and investment advice to planner. Software has virtually commoditized the "financial advice" component of what a financial advisor does. Most advisors are struggling with how to move into this new world as their value proposition does not include helping a client plan. Our approach is completely different. We help you plan first, then determine the financial means to get you to where you want to be.

We invite you to learn more about our services, our value add differentiators, and to reach out to discover what we can do for you!

For your Business Retirement Plan:

- Fee and Expense Management
- Provider Benchmarking
- Investment Selection and Management
- Improved Participant Outcomes
- Employee Demographic Analysis
- Support for your Fiduciary Obligations

For Yourself:

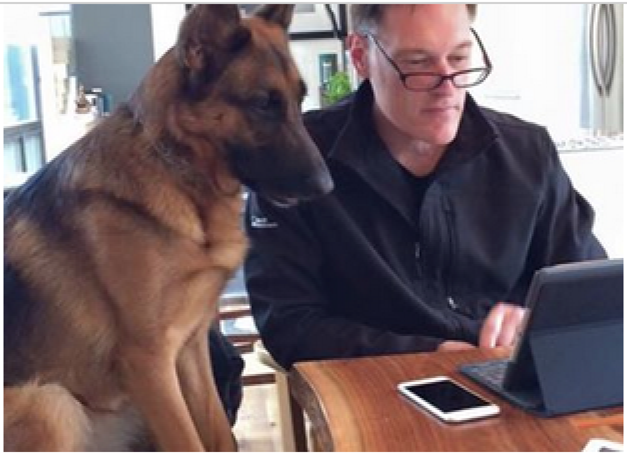
- Multi-Dimensional Approach to Securing your Financial Future
- Holistic, multi-disciplined Perspective of an Attorney, CPA, and Financial Planner
- Specialized Knowledge of Pass-Through Tax Entities Focused on Partnerships, LLC, and S-Corps
- Goal Focused Wealth Planning
- Ongoing Reviews and Relationship to Ensure that Plans are Implemented, Adjusted, and Working

Peter A. Welsh | JD, CPA

Pete spent the early part of his career as both a lawyer and CPA specializing in complex tax matters, partnership tax, estate planning and retirement plans for companies. Pete has also spent considerable time

Having returned to his passion of helping individuals, particularly Partners, LLC Members, and S-Corp owners as well as their organizations, Pete is excited to assist you as you navigate the complicated financial relationship between your business and your personal lives.   His unique skill set as an attorney, CPA, and financial advisor allows Pete to work with your other advisors in a way that few are able to do.

Pete received his undergraduate degree in Finance from the University of Notre Dame, and his Juris Doctorate from Indiana University. He was admitted to the Indiana State Bar in 1994.   Pete is a licensed CPA in the state of Indiana. He serves in a Fiduciary capacity to his clients as a fee only advisor. Pete resides in Indianapolis, IN with his wife Sarah and two dogs, Dylan (see below) and Guinness. He is also an instrument rated pilot, and a painting of his plane is above, by Steve Paddack.



Contact Us

We welcome the opportunity to have a conversation with you. Ideally, we can help you in your financial journey. If not, we will let you know and we will part as friends. Either way, we believe a conversation is valuable.

* *Indicates required field*

First Name *

Last Name *

Email *

Comments *

Submit

401kGUY.biz

All services discussed on this site offered through Thurston Springer Advisors, a SEC-registered investment advisor.
9000 Keystone Crossing, Suite 700
Indianapolis, In 46220
317-581-3908