



PROACTIVE
PLANNING
PARTNERS
TRUSTED ADVISORS



**WE ARE IN THE
KNOWLEDGE
BUSINESS**

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Welcome to ProActive Planning Partners

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ProActive Planning Partners is an independent Investment Advisory firm committed to your well-being. We provide customized wealth management and financial planning services for clients in all phases of life. Our role is to be your trusted advisor, the person you turn to for financial advice, counselling and education. Education is critical for helping our clients achieve their unique goals through a comprehensive, holistic planning approach to achieve short and long-term financial success and security.

We believe that being **ProActive** as circumstances in life change along with knowledge and education throughout the **Planning** process are important ingredients to achieve financial success and security. Lastly, as you **Partner** with ProActive Planning Partners, you can trust that we will be there for you, your family, and your business.

Every individual and business is unique, which is why we work with you to understand your priorities and customize to your needs and goals. As people go through stages of life, such as, entering the work force or getting ready to retire, it is most important to be ProActive, go through the Planning process, and Partner with an advisor you know will be there for you, your family and your business.

ABOUT US

What We Do (/what-we-do)

Team (/team)

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Asset Management (/asset-management)

Risk Management (/risk-management)

CORPORATE ADVISORY SERVICES

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PEO (/peo)

Group Health Insurance (/group-insurance)



(/business-financial-planning)

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Financial freedom is the ability to choose how you live your life.

Our clients choose us to help them achieve it!

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