PLANNINGTEAM FINANCIAL ADVISORS - JULIE HINSZ, WEALTH MANAGER

WELCOME TO MY WEBSITE!

My name is Julie Hinsz and I put my financial experience to work to help people manage their wealth and specialize in:

- Pre-retirees
- Retirees
- Small Business Owners
- Women

I thoroughly enjoy working with people to assess their situation and help them plan a strategy for their finances. ***But this isn't about money*** . . . it's about you, your life, and what ***you*** want out of it. Travel? Greater financial security? A new business venture? Money is just the means to make your goals become a reality. I can help you maximize your wealth so that you can spend your time on the important things in life.

Asking someone to help manage your finances and money is a big step - you should feel comfortable with your financial advisor and trust him or her completely. Your interests will always come first, and our belief is that by serving you well, we will be successful. Integrity and trust are values that are essential in a personal, financial relationship, and we will strive to earn and live up to your trust.

IT'S ABOUT YOU.

OUR PHILOSOPHY

We set ourselves apart from other advisors and planners with our ongoing advice, resources, experience, client service, diversification and availability. We focus in on you, your life, and how your financial plan can help enable you to live your life and work toward what's important to you.

WHAT WE DO

WHAT WE DO

Our process helps clients along the path to successfully achieving their life goals. Good financial planning involves more than a savings account or an investment security. Whether you're an individual, family, or small business owner, we will help to ensure that you are making the most of your assets.

OUR SERVICES

WHO WE ARE

Our team is comprised of people with different kinds of finance experience, but we all have this in common--a commitment to ethics and integrity. You can count on objective recommendations and impartial guidance. We're working hard to help turn your goals and dreams into REALITY!

MEET MY TEAM

MARKET WATCH

IMPORTANT CUSTOMER INFORMATION

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