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FORTUNE FINANCIAL ADVISORS

We like to think Fortune Financial Advisors found us instead of the other way around. After spending several decades in senior-level positions in a variety of roles in the corporate and financial services arena, one thing became clear: it's about people. And it's about turning visions and dreams into sound financial decisions you make today to get you where you want to be tomorrow.

That's what excites and drives us.

So in 2008, we founded Fortune Financial. By teaming up to offer independent wealth management services, we brought together years of exceptional talents and experience, focused and disciplined investment philosophies, along with a unique set of complementary skills.

Today, we offer a full spectrum of financial planning and wealth management services that are tailored to your personal, business or retirement plan goals. As we continue to add exceptional personnel to the Fortune Financial team, a singular focus will always guide us – it's about people and their dreams, and how we can align financial decisions to make them a reality.

So whether you're looking to grow your small business, maximize your company's retirement plan, just want to make sure you are able to maintain your lifestyle in retirement, or simply weather a storm if you need to, put Fortune Financial's expertise to work for you.

We provide fee-only advisory services so you have the peace of mind knowing your best interests are our priority.

Contact us today to find out how you can put our talents to work for you.



You take your wealth management goals

personally. So do we.

PERSONAL WEALTH MANAGEMENT SERVICES FROM FORTUNE FINANCIAL COME WITH ATTENTIVE, PROVEN AND TIME-TESTED METHODOLOGIES TAILORED TO ACHIVE YOUR GOALS.

Is your retirement plan feeling a little ignored?

GIVE IT THE EXPERT ATTENTION IT NEEDS WITH FORTUNE FINANCIAL RETIREMENT SERVICES.





Do you have a plan?

THE FIRST STEP IN CREATING A STRONG FINANCIAL COMPONENT OF YOUR LIFE PLAN IS TO CONDUCT A FINANCIAL “REALITY” CHECK.

What would happen to your company if you were no longer around to lead it?

OUR DECADES OF BUSINESS EXPERIENCE CAN MAKE YOUR MONEY MATCH YOUR BUSINESS GOALS.

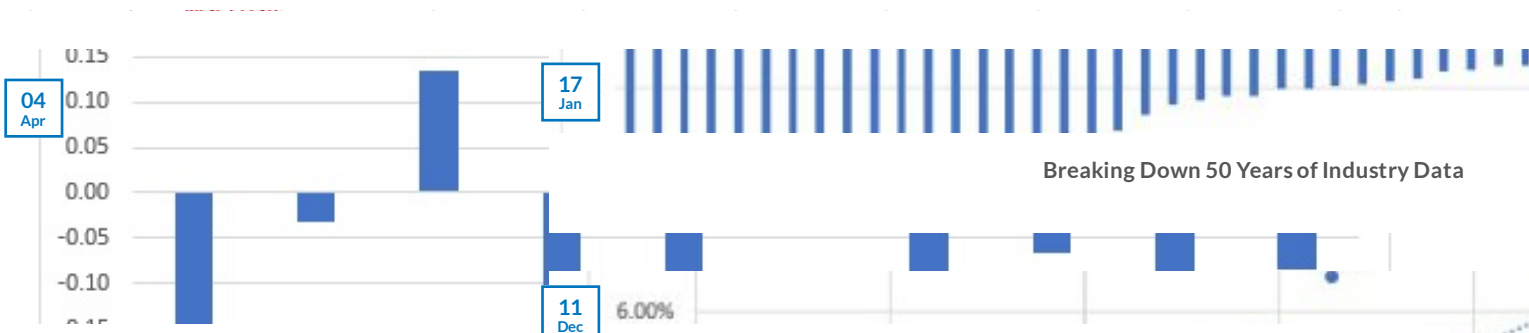


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We are people who love people. If you're looking to make serious financial strides in your personal or professional world then we would love to talk about how we can help.

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