

It All Starts With A Comprehensive Financial Plan -

Which puts you on the right path to

What Interests You Today?



Asset
Protection



Does My
Portfolio Fit



Estate Planning
Guidance

We can provide guidance on

Insurance is essential to any comprehensive financial plan. If tragic events like death, disability or critical illness strike, insurance can protect you and your family from hardship.

Me?

Capture your risk tolerance and see if your portfolio fits you.



intergenerational planning and the transfer of assets and/or collaborate with your existing Estate Planning professional to minimize the possibility of something falling through the cracks.

Meet Our Team



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Looking to learn more?

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Thank You for the ULTIMATE Service

Chrissy McCormack | Jun
3, 2019

By: Chrissy McCormack
Memorial Day: A day when the United States mourns those members who died in active military service. How do you honor the men and women of our country who paid the ultimate sacrifice for our freedom? Well, if you live in Cohasset, you have three days of events honoring and memorializing those who gave their lives for our country with those that were fortunate enough to come home. Cohasset is a small...



The Happiest Place on Earth (at least for shopping)

Chrissy McCormack | Jun
3, 2019

No, I'm not talking about Disney World; but rather the Natick Outdoor Store; a sporting goods store outside Boston. My son is building a canoe as part of a high school project, for which he is thrilled as he loves to fish. For our household the challenge of owning a canoe is the minor detail of how to get this water craft home and transport it to local bodies of water. We are not buying...



Do You Desire "Retirement Peace of Mind?"

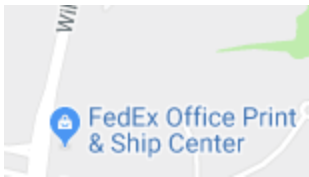
Chrissy McCormack | Jun
3, 2019

In December 2012, a landmark study was launched to determine a national retirement peace of mind.[1] It included more than 6,000 respondents age 45 and older. It found that average Americans have a lot of challenges and a lot of expectations for their retirement years. Retirement Expectations Traditionally, many Americans have viewed retirement as a time of leisure. Today, more and more of us expect to work during our retirement years. Seven out of ten...

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