



Center for **Financial Planning**, Inc.®

Helping You

Live YOUR Plan™

Your financial advisor should do more than manage your money.

LET'S CHAT (/CONTACT)

We believe financial planning starts with *your* story.

Let's use that full picture to identify your goals then make a plan. We call it: Turning thought bubbles into reality. Because how can you get there if you don't know where you're going? And because we can all use a little help along the way.



Decide with Confidence

Making financial decisions can be complicated. The Center process allows you to address and make immediate decisions while planning for your future. Building wealth and passing it on is no easy job. It comes with big decisions. What do you want for your future generations? What are your elder care needs? We'll help you find the best answers for your family. **Let's Talk >> (/contact)**

Experience Matters

Making the right choices about a Trust or your 401(k) can seem overwhelming. That's where we come in. Our experience goes beyond asset allocation and rebalancing portfolios. You'll find expertise on everything from financial planning for divorce to ESG investing. And we have a lot more personality than a retirement calculator. **Let's Talk >> (/contact)**



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MEET YOUR CENTER PLANNERS



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Nick Defenthaler, CFP®



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Laurie Renchik, CFP®, MBA



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Timothy Wyman, CFP®, JD



The Center Welcomes New Partner Angela Palacios, ...



WORKING WITH THE CENTER



If a picture is worth a thousand words, how many is a video worth?

We invite you to learn a little more about working with The Center by watching the videos below.

We're looking forward to hearing from you - **Let's Chat!** (/contact)

Financial Planning ...



Working Together ...



Getting Started wit...



Financial Planning with
The Center

Working Together with
The Center

Getting Started with
The Center



UPCOMING EVENTS & WEBINARS



(/events/2019/6/1/haven-donation-collection)

HAVEN Donation Collection (/events/2019/6/1/haven-donation-collection)

Jun 1, 2019 – Jul 31, 2019 · 8:00 AM



(/events/2019/5/20/what-donors-want)

WEBINAR: What Donors Want (/events/2019/5/20/what-donors-want)

Jul 30, 2019 · 1:00 PM – 1:45 PM

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