Ready To Breathe Life Into Your Financial Plan?

An exceptional life starts with an exceptional plan.

Schedule An Appointment

Effective Game Plan

Advice In Common Language

Straightforward Fees

You Deserve To Understand What's Happening With Your Money.

At Abaris Financial Group, we believe clients should understand everything that is happening with their money; that advisors should be just as good about explaining investments as they are at making them.

1

QUESTION

What are you going to do with my money?

First, we're going to get to know you and discuss what's most important to you. We're going to figure out your goals and the outcomes you'd like to achieve with this money. We'll do this by establishing your Family Index Number, which is the rate of return needed on your investments in order to pursue those outcomes. After we determine your Family Index Number, we allocate your money to our various investment strategies designed to help you pursue those goals.

2

QUESTION

Can you handle the complexity of my situation?

We work with a wide variety of clients – everyone from high net worth investors to those who are just starting out. While each family gets a personalized allocation strategy, we've helped thousands of families navigate their complex financial needs and guided them through life's major decisions.

3

QUESTION

How can you make my life easier?

As your trusted advisor, we're focused on adding convenience and simplicity to your lives. We will make sure you're educated on your investments and how we manage your money – as much or as little information as you'd like.

Whether you're investing hundreds or millions, at Abaris Financial Group we're about much more than results – we're about helping you understand where those results have come from and why the strategy works. If you're tired of the mystery of investing and want to know exactly what's happening with your money, schedule an appointment today.

Forbes

BARRON'S HALL OF FAME

InvestmentNews ICONS & INNOVATORS

Discover The Right Investment Strategy For You.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

More than 8%

Next

Let's Build The Future You've Earned. Together.

Our mission is to change lives by bringing personal fulfillment and a lasting legacy to our clients through comprehensive, fee-only financial planning, life planning, coaching and investment management services. Abaris Financial Group is a wealth management firm based in Concord, Massachusetts, serving affluent individuals and families.

Contact us today and let Abaris help you on your True Wealth journey.

Contact Us

Are You Ready To Join Us On This Journey?

Schedule a complimentary financial life plan discovery session with us to learn more about the benefits of financial life planning.

First Name*

Last Name*

Email*

Phone Number*

Submit

Our Financial Planning Services Are Built On Trust, Transparency and

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams.

Explore Services

Financial Life Planning & Coaching

Your life and financial goals are forever intertwined. Your portfolio shouldn't represent market whims, or even what your advisor prescribes, but who you are.

Traditional Wealth Planning

Traditional wealth planning is the foundation of all that we do. We follow a 4-step process to create a customized roadmap to achieving your goals.

Life Transition Planning

Change can be challenging even in the best of circumstances and having an experienced trusted advisor to help you navigate uncharted territory can reduce your stress and make for a smoother experience.

Estate, Tax & Philanthropy Planning

Portfolio Management

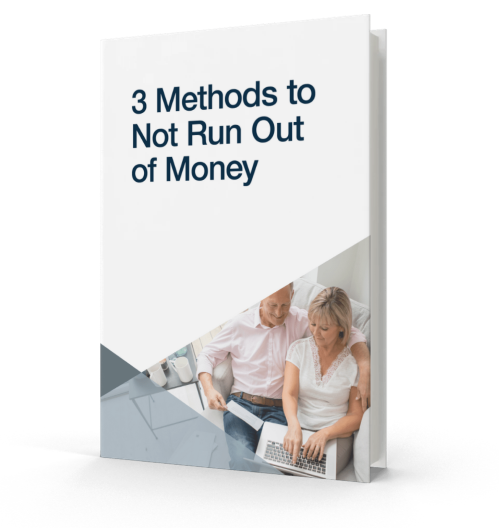
The Abaris team sees

Private Trust

One of the most important

you want to be remembered?

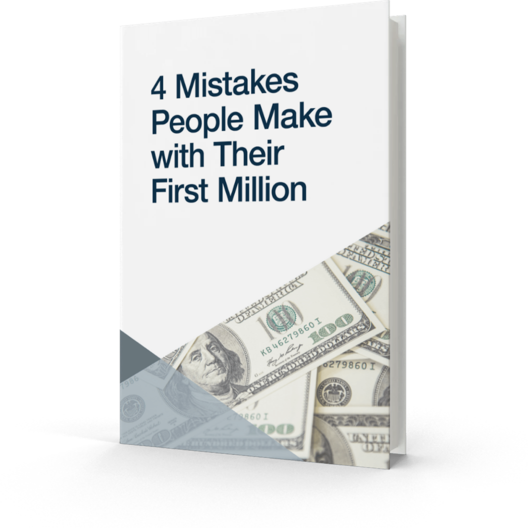
Download One Of Our Free Guides.



3 Methods to Not Run Out of Money

What's the #1 fear in retirement? Running out of money. Get our step-by-step guide to help ensure your assets last a lifetime.

Download Now



4 Mistakes People Make With Their First Million

Identify the next set of challenges you may face and avoid these common mistakes. Get our step-by-step guide to focus on turning your first million into two.

Download Now

Insights

Abaris Financial Group's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need.

Read More

Market Commentary

Weekly Market Commentary – June 17, 2019

The S&P 500 followed up the previous week's strong gains with an increase of 0.5% last week. Decent economic data was encouraging but not strong enough to change expectations for much-desired interest rate cuts this year. The global MSCI ACWI climbed 0.3%. Heightened risks loom in the global market from tanker attacks and Hong Kong protests. The Bloomberg BarCap Aggregate Bond Index was unchanged as expectations for economic growth remained subdued.

Read more

Blog post

5 Reasons to Think About Long-Term Care Planning Today

By Jamie Hopkins, Director of Retirement Research at Carson Group

I once received an email from a family friend about long-term care insurance. He was frustrated over a premium increase – which wasn't the first rate hike – yet, he was still thankful for the policy.

Weekly Market Commentary

Weekly Market Commentary – June 10, 2019

The S&P 500 surged 4.5% last week as optimism about the Federal Reserve cutting rates and the quick end to potential tariffs on Mexican goods pushed markets higher. The global MSCI ACWI soared 3.6% as international markets participated in the surge, but not as much as domestic markets. The Bloomberg BarCap Aggregate Bond Index gained 0.4% as weak jobs data and the hopes of interest-rate cuts pushed rates lower and bond prices higher.

Read more

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