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Welcome to Excel Financial

Excel Financial is an independent fee-only investment advisory firm.

Unlike financial product vendors that masquerade as investment advisors, we have a fiduciary responsibility to serve the interests of our clients first -- always. Our relationships and interests are tied to those of our clients.

We accept no commissions and have no sales quotas, and thus have no corresponding conflicts of interest. Simply put, we succeed when our clients succeed.



Planning for your Financial Future

Financial Planning

A financial plan is your road map for achieving your financial life goals. Creating and managing a prudent financial plan greatly improves the probability of achieving your desired life goals and avoiding pitfalls along the way.

Financial Planning

Learn More (<http://excelfinllc.com/our-services/>)

Investment Advisory & Management Services

Asset allocation and portfolio management are key determinants of the achieved performance and variability of your investment portfolio over time. Getting the most from your available resources requires careful, disciplined security selection and ongoing portfolio management.



Investment Advisory & Management Services

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Retirement Plans

Employer retirement plans offer tremendous benefits for business owners, employees, and sponsoring companies. Selecting the best plan and vendors to meet your needs and managing their implementation and ongoing program operation requires expertise, focus, discipline, and the application of prudent management practices.



Retirement Plans

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Risk Management



What happens if...? Risk management strategies to help ensure that your financial goals are met, even if life throws you a curve ball. The transition from a growth focus to income production is significant. Income distribution planning focuses on maximizing the income-producing capability of your available assets while ensuring required reliability. [Learn More \(http://excelfinllc.com/our-services/\)](http://excelfinllc.com/our-services/)



Income Distribution

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Legacy Planning



Legacy planning is the process of ensuring the transfer of assets at death and provision of authority sufficient to meet ongoing needs in the event of incapacity. Making these decisions up front helps ensure that events occur as planned and reduces the burden on loved ones during already difficult times.

Legacy Planning

[Learn More \(http://excelfinllc.com/our-services/\)](http://excelfinllc.com/our-services/)

Tax Planning



Managing your tax bill is an important step in maximizing the value of your assets and income potential over time. Tax planning involves identification and selection of investment products and strategies designed to reduce taxes and maximize your income and assets.

Tax Planning

Learn More (<http://excelfinllc.com/our-services/>)

"You should fire your broker and find an investment advisor. Brokerage firms would like you to think that they perform the same function as investment advisors. Many brokers call themselves 'financial consultants' or 'financial advisors'. But they are not the same as independent investment advisors... an investment advisor's fiduciary duty is on a higher plane, like that of a lawyer, a trustee, or the executor of an estate."

- Arthur Levitt, Former SEC Chairman

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Excel University BLOG

We've compiled resources, from articles and newsletters to videos and flip books. And we're always adding more. We want to educate you in the world of financial investment to help you make more educated decisions about your finances.





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