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Financial Service and Planning *

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Financial Service and Planning *

K. Ken Wu, MBA, ChFC, CFP®.

A Certified Financial Planner™ (CFP) and Chartered Financial Consultant (ChFC) certificant, and also an Investment Advisor Representative, has been in the financial service industry since 1995. A graduate from University of South Alabama with a Master of Business Administration (MBA), core in finance (1995). And also a graduate of Livingston University with a BS degree in Business Administration emphasis on computer information science.(1993). He's bilingual in English and Chinese.

Planning for your financial independence may seem complicated in today's world. A broad knowledge of everything, from a simple saving plan to complex investment strategies and keeping up with constantly evolving new products and tax laws, are required.

As the scope of financial services grows, so does the need for professionals to provide these services. That's why we approach your personal and business financial planning* needs with a specialized team. It's the key to our success, and yours.

Professionals in a variety of financial planning disciplines* combine their knowledge and experience, using sophisticated support systems, to determine the right financial strategy for your individual needs.

We are dedicated to help you:

- Acknowledge and Identify your goals.
- Develop financial strategies based on broad knowledge and sound advice.
- Implement your personalized plans with adjustments and wide range of competitive products.in the market
- Review and update on a regular basis, make adjustments if necessary.

With those in mind, we strive to provide you with best services and work with you to develop and implement your financial future. Throughout this process, we never lose sight of one essential element -- **Personal Service to you, our clients**.