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What We Do

DHJJ Financial Advisors' approach to financial planning is based on providing a full-service program that integrates individual income tax planning along with investment management, resulting in a holistic strategy to help our clients maximize their financial success. Our investment advisers are CERTIFIED FINANCIAL PLANNER™ professionals and Certified Public Accountants which enable them to overlap their expertise in asset management, financial planning, and income tax law to provide unique solutions to our clients' needs.

Asset Management

Custom investment portfolios based on your goals and objectives

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Financial Planning

Comprehensive evaluation and analysis to assess current financial situation and plan for the future.

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***Please Note:** Advisory services provided by DHJJ Financial Advisors (“Advisors”), an SEC registered investment adviser. Accounting services can be provided by Advisors’ affiliated entity, DHJJ Certified Public Accountants (“CPA”), per the terms and conditions of a separate written engagement agreement. No Advisors’ client is under any obligation to engage CPA, and vice-versa. As more fully discussed in Advisors’ written disclosure Brochure (<https://dhjjfinancial.com/wp-content/uploads/2019/03/Part-2A-of-Form-ADV-Mar-18-2019.pdf>), a recommendation that an Advisors’ client engage CPA, and vice-versa, presents a conflict of interest.

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