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Secure Your Future

At Whelan Financial, clients come first. We aim to provide an unparalleled level of service. Learn how our experienced professionals can tailor a financial plan to fit your goals.

Wealth Management

Eliminate the confusion. Personal Wealth Management answers questions like, “How should I invest my money,” “Can I afford to retire,” “How can I maximize my social security benefit,” and “Can I reduce my taxes.”

[\(../services#personal\)](#)

Learn More

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Company Retirement Plans

As fiduciaries, Whelan Financial supports companies in caring for their employees through responsible management of 401(k)s, pensions and profit sharing plans. We encourage participants to better their financial future through investment education and emphasize the impact of saving now.

[\(../services#company\)](#)

Review Retirement Info

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À La Carte Services

WF Portfolios

Save time, save money, save stress with our automated investment platform.

Social Security Planning

Maximize your social security benefit. Whelan Financial can guide you through the complexities of your social security planning.

[\(../services#carte\)](#)

View Our Services

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Achieve Your Financial Goals

Learn About All Our Services

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Let Us Help You Plan for Your Future

Let's Get Started ([../contact](#))

Whelan Financial

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Resources

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