



☰ Menu

Financial Planning and Investment

# Investing for Your Future

As a primary fiduciary, we serve committed investors who have complex financial needs.



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Schedule a  
Complimentary  
Consultation  
Today!

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**More Than 55 Years as Fiduciary Financial Advisors**

## Fiduciary-Centered Advice

A “fiduciary” is someone who manages the assets of another person and stands in a special relationship of trust, confidence, legal responsibility, and is required by law to always act in the best interests of its clients, beneficiaries, or retirement plan participants. Acting as a fiduciary is at the core of each client relationship we build.



### Families & Individuals

- College Education
- Purchasing a New Home
- Investing in Your Future
- Saving for Retirement



### Corporate Retirement Plans

- Profit Sharing
- 401(k) and 403(b)
- 457 Deferred Compensation
- Employee Stock Ownership Plans

<https://petersenhastings.com/we-serve/families-individuals/>

<https://petersenhastings.com/we-serve/corporate-retirement-plans/>



## Charitable Organizations

### Managing Portfolios For:

- Corporations
- Foundations
- Endowments

<https://petersenhastings.com/we-serve/charitable-organizations/>



## Private Trust Services

- Living Trusts
- Charitable Trusts
- Irrevocable Trusts
- Asset Protection Trusts

<https://petersenhastings.com/we-serve/private-trust-services/>

# *the* Trusted Financial Path™

- 1 The Compelling Conversation
- 2 The Evidence-Based Method
- 3 The Essential Discovery
- 4 The Strategic Solution

### How It Works

<https://petersenhastings.com/how-we-serve/the-trusted-financial-path/>

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