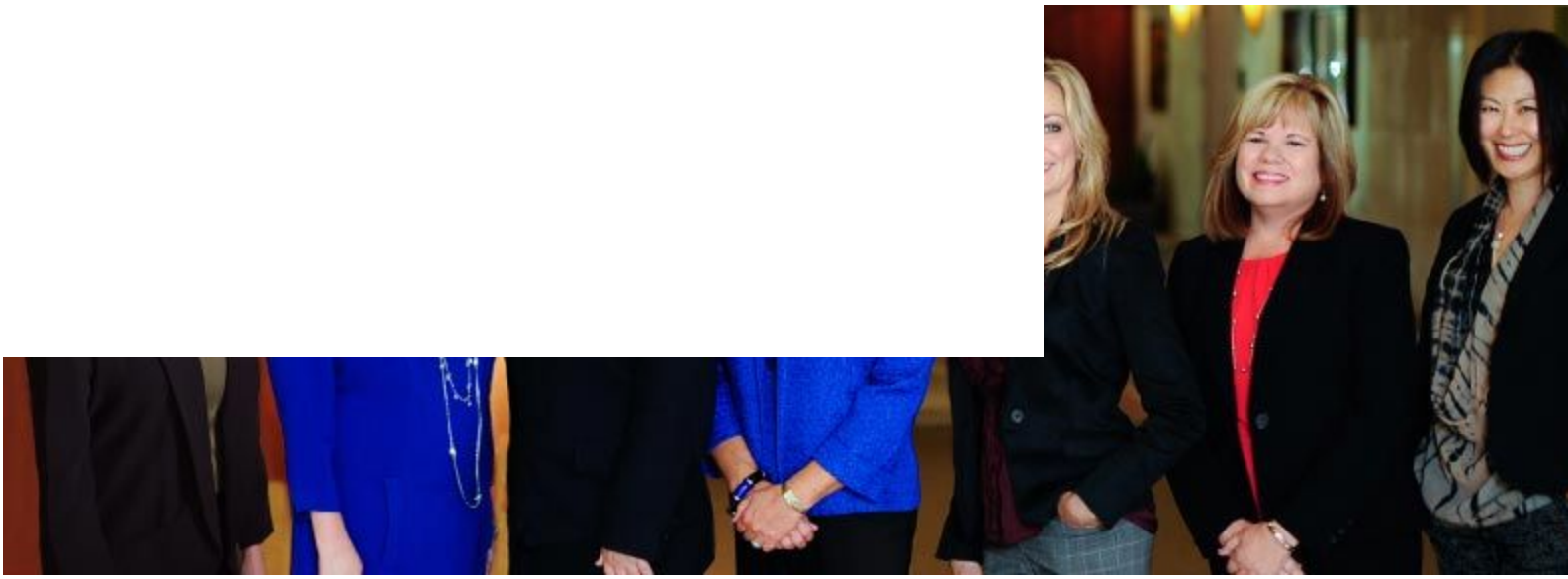

Congratulations Erin Nelsen!

We are pleased and excited to announce that Erin Nelsen, CFP® is now a partner/owner at Asset Planning, Inc. Erin has been w
Asset Planning, Inc. since 2007. She has had been an integral member of our team and overall growth of our firm for the past 12
We look forward to the future with her as a partner and the continued success of Asset Planning.

https://www.assetplanninginc.com/erin-nelsen

Planning a Successful Retirement

Check out our new Ebook! In it you will find some valuable tips and guidance for retirement planning from our CERTIFIED FINAN
PLANNERS®.

Tips_to_Planning_a_Successful_Retirement.pdf

Financial Advisor Magazine's RIA Survey & Ranking

July 2018- Asset Planning is recognized in the Financial Advisor Magazine's RIA Survey & Ranking. Take a look at the ra

2018 Five Star Wealth Managers Award

June 2018- Sandy, Carol and Erin are awarded the 2018 Five Star Wealth Managers Award and are featured in the Orange Coa Magazine's June 2018 issue. Check it out here

More Articles ...

- Financial Planning Magazine
- Barron's Top Independent Advisors Summit 2018

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Asset Planning, Inc. is a registered investment adviser. More information about the firm and its principals can be obtained through www.adviserinfo.sec.gov the Investment

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Easily accessible from Los Alamitos, Rossmoor, Seal Beach, Huntington Beach, Newport Beach, Irvine, Tustin, Yorba Linda, Brea, Fullerton, La Palma, Torrance, El Se and Orange County.