(/)

What's Your Risk Number?

(http://www.facebook.com/#)

Phone: 1-866-266-2670 (tel:1-866-266-2670)

Email: info@concordeplanning.com (mailto:info@concordeplanning.com)

Client Login (https://www.wealthscapeinvestor.com)

Concorde Financial Resources

Let's Work Together

Helping you succeed by providing personal attention to you, your goals, and your financial well being

About Us

Concorde Financial Resources is a fully independent, fee-based comprehensive financial planning and investment advisory firm.

Story
& History

Established in 2001, our team puts extensive experience, education and professional licenses to work to achieve your financial goals. We are passionate about what we do and our commitment to clients. We help clients achieve financial goals by providing a framework and direction for achieving those goals. Our team provides financial services to individuals throughout the United States.

Process
& Philosophy

As a firm, our focus is to understand your goals and develop a plan to reach them.We will meet with you to present an analysis and discuss our recommendations.Together, we implement the recommendations and monitor your progress.

Mission
& Services

Our mission is to provide prudent, objective, and comprehensive financial advice, serving the best interests of our clients.

Our Values

Trust

Trust is a key element in all relationships – especially those involving your finances. We earn and maintain your confidence by demonstrating integrity, competence and professionalism. Your information is personal and confidential, and shall remain so, unless authorized by you or required by law.

Relationships

We value our client relationships. We know that dreams and realities change over time; we see our role is part of an on-going life plan. We are blessed with long term clients that value and refer our services.

Service

We are committed to our clients. "Being there" is a fundamental premise. Being there means: having a live person answer the phone; getting quick responses to questions and requests; acute listening; regular contact, fixing problems. We strive for the highest standards of personal service.

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(/products)

How We Manage Money (/products)

Meet Our Team

Learn more about our amazing team of professionals and see what makes us different. We're here to help guide you in the right direction.

VIEW ALL TEAM MEMBERS (/OUR-TEAM)

(/team-member/wade-e-sanders)  (/team-member/wade-e-sanders)

(/team-member/wade-e-sanders)

Wade E. Sanders (/team-member/wade-e-sanders)

Investment Advisor (/team-member/wade-e-sanders)

(/team-member/james-c-faw)  (/team-member/james-c-faw)

(/team-member/james-c-faw)

James C. Faw (/team-member/james-c-faw)

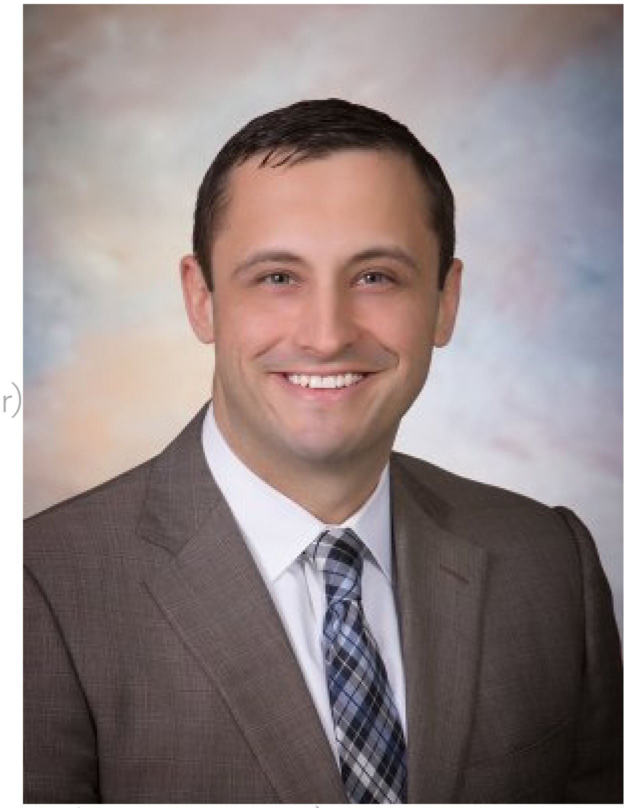
Tax Advisor (/team-member/james-c-faw)

(/team-member/cathy-ferguson)(/team-member/cathy-ferguson)

(/team-member/cathy-ferguson)

Cathy Ferguson (/team-member/cathy-ferguson)

Investment Advisor (/team-member/cathy-ferguson)

(/team-member/john-m-menser)  (/team-member/john-m-menser)

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John M. Menser (/team-member/john-m-menser)

Investment Advisor (/team-member/john-m-menser)

(/team-member/nikki-carpenter)  (/team-member/nikki-carpenter)

(/team-member/nikki-carpenter)

Nikki Carpenter (/team-member/nikki-carpenter)

Administrative Assistant (/team-member/nikki-carpenter)

Quarterly Commentary

Stay up to date with our latest financial news.

VIEW ALL BLOG POSTS (/BLOG)

Top 5 Things 20-Somethings Need to Do (/blog/top-5-things-20-somethings-need-do)

Published: Jan **3**

If you're in your 20s, rejoice! You're in a great position to create the life you want, starting with a secure financial future. While it's common to feel overwhelmed when entering the workforce full time, there are a lot of things you can do fresh out of college that will help you attain your professional and financial goals earlier than you may expect.

READ MORE (/BLOG/TOP-5-THINGS-20-SOMETHINGS-NEED-DO)

It's Never Too Late to Save (/blog/it-s-never-too-late-save-0)

Published: Nov **26**

Retirement can sneak up on you.

READ MORE (/BLOG/IT-S-NEVER-TOO-LATE-SAVE-0)

Tax Planning Basics (/blog/tax-planning-basics)

Published: Nov **21**

For years it was assumed that tax planning was reserved for the wealthy. While wealthy individuals will see the most benefit from tax planning, with big changes looming for the 2018 tax year, even middle-income earners can reap the benefits of tax planning.

READ MORE (/BLOG/TAX-PLANNING-BASICS)

Quarterly Commentary

Email

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