



Main Street Financial is a registered investment advisory firm based in Westchester, NY serving clients mostly from the greater NYC area. We are dedicated to helping clients achieve and maintain financial security. As fee-only advisors, we offer independent financial planning and portfolio management services tailored to the needs of our clients and their families. We adhere to the fiduciary standard, ensuring that the interests of our clients come first and foremost.

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# OUR SERVICES

Each of our planners is a CFP or CPA. This combination of skills provides clients with a rare level of professional expertise in the following areas:





We deliver Wall Street expertise,  
but with Main Street values.

### Recent Posts

Tax Appointment Checklist – “What Do I Bring?”

Mortgage Interest Deductions May Get Extra Scrutiny (updated for the new tax law)

Congratulations to Leo Cunningham, CFP, EA

STEP THREE: HOW ARE YOU GOING TO GET THERE?

STEP TWO: WHERE DO YOU WANT TO BE IN THE FUTURE?

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