



Laurel Wealth
Planning

A portrait of a woman with short grey hair and glasses, wearing a teal textured shawl over a black top. The background is a blurred office setting with a sign that reads "LAUREL WEALTH PLANNING".

Connected

We develop a personal connection with you. We're in it for the long haul.

A holistic, integrated and personable approach to financial planning

How connected do you feel to your financial planner? If you ran into them socially, would they remember your name, your dreams and your goals?

At Laurel Wealth Planning, the connection we develop with you is at the very heart of what we do. It drives our high-touch service, our thoughtful attention to detail, and our proactive, individualized financial planning and wealth management advice. We have developed very specific values and standards for our relationships with clients over the more than 20 years we have served them.

Have you ever wanted a financial “voice of reason” to help you sort through complex issues? When we understand your preferences and priorities, as well as knowing how you think and where you want to go, we can be the advisor you trust for the long term. We hold ourselves to the highest fiduciary standards, putting your best interests first. By focusing on the complete picture — inside *and* out — we can bring many opportunities to your attention and help you make sense of the many possibilities facing today’s investors. This includes investment plans, wealth accumulation strategies and preservation, tax reduction, and planning for retirement.

Some clients come to us during or after a divorce, or after losing a loved one or when planning for retirement. Whether you have managed your money for years or are facing a steep financial learning curve, we will tailor our advice to help you.

Will it be worth it when you get there?

Building wealth isn’t just about the end game, it’s about allowing you the freedom to do what makes you most deeply happy — now, and all along the way. For some, that’s buying a boat, taking a lavish vacation or setting up a college fund. For others, it’s being able to spend time with family and friends, making a difference in the community or donating to charity.

A financial plan is not a mandate to stop spending and start saving. To be successful, a plan has to be both sensible *and* pleasurable, balancing short-term rewards with long-term goals. Money is only half the equation — how you can use it to enrich your life is the other.

[See how Laurel Wealth Planning can help.](#)



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