Our Firm

LePhew Financial Services, Inc. is a fee only financial planning and investment advisory firm. It is the pleasure of our daily work to help you in whatever way we can. We are grateful that almost all of our growth has come from clients recommending us to their friends and associates.

HERE'S WHAT WE KNOW

1 Making the decision to trust an advisor with assets you work a lifetime to accumulate is a very big step. We will never pressure you to make that decision. We would be honored to have the opportunity to show you what we do for a reasonable fee. If we present an initial financial plan to you and we both feel the relationship is a good fit, we will be happy to add you to our client list. If not, we are confident you will have received good value for the initial planning provided and wish you the very best.

2 Once you give us the honor of being your adviser, we have a huge responsibility. It is our task to continuously obtain up to date knowledge regarding financial technical matter, to apply what we know to your unique situation, and to make sure you are on track to achieve your goals.

3 Life rarely proceeds according to plan. We need to always know where you stand and how to best adjust when surprises come along.