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Specialized in Serving Oil and Gas Retirees

Advisor.investments is an SEC-registered RIA firm headquartered in Baton Rouge, Louisiana, serving affluent individuals and families who generally tend to have $1MM in net worth or more.

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Our Firm

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.

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Latest Blog Posts

Should I take my pension as lump sum or monthly payment (or both)? (/blog/Should-I-take-my-pension-as-lump-sum-or-monthly-payment-or-both)

If retirement is on your mind, the big question probably goes something like this, “Should I take my pension as a lump sum or a monthly payment?” In this article we’re going to look at a hypothetical company’s pension plan benefits and help you figure out if you should pursue the pension plan or the lump sum options.

Retirement coming soon?

Retirement is on its way, there’s no denying it. So you clear off the cobwebs one day and open up…

Read More (/blog/Should-I-take-my-pension-as-lump-sum-or-monthly-payment-or-both)

The Making of an LC Wildcat: Interview with our own Shantelle Palermo (/blog/making-lc-wildcat-interview-our-own-shantelle-palermo)

We recently found out that Shantelle Palermo (http://www.advisor.investments/tax-strategies-consultations-shantelle-palermo-ea), a team leader with our company, will see her son off to college this fall at Louisiana College (https://www.lacollege.edu/) at Pineville. He'll be playing football for the Wildcats!

We had to sit down with Shantelle to find out what the process was like getting a child into a collegiate sports program. We were...

Read More (/blog/making-lc-wildcat-interview-our-own-shantelle-palermo)

What You Should Know About Retiring From ExxonMobil: Retirement Planning Tips for ExxonMobil Employees (/blog/what-you-should-know-about-retiring-exxonmobil-retirement-planning-tips-exxonmobil-employees)

Most of what we do or have done here at Advisor.Investments has come through two decades of experience working with families going through the ExxonMobil retirement plan and its process. Here are some retirement planning tips for ExxonMobil employees who are wondering what you should know about retiring from ExxonMobil.

What You Should Know about Retiring from ExxonMobil

With so many investment advisors to choose from, how do you know that you'd be...

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