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Listed in "Top 50 Fastest-Growing Firms" in survey by FA Magazine. [Read more here >](#)

Our First Meeting

In the introductory meeting we learn about you and your current situation and you learn about Elser Financial Planning, Inc. This is a free meeting, over the phone or in person. . .

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Financial Planning

We provide fee-only, comprehensive financial planning incorporating retirement, estate, charitable and tax planning, life insurance needs, investment review . . .

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Investment Management

We believe in a disciplined, low-cost approach to investing that incorporates research, risk, diversification . . .

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8900 Keystone Crossing Ste. 450

Indianapolis, Indiana 46240

Phone: 317-731-5615

Fax: 317-731-5749

E-Mail: info@elserfp.com

Web: www.elserfp.com

Our Firm Brochure (Part 2A of Form ADV)

describes our practice and investment philosophy as well as discusses our fees and the potential risks of investments. [Click here to download PDF.](#) (Adobe Acrobat required to view, [you can download that here](#)).

[Click here to check our compliance record](#) at **BrokerCheck powered by Finra.org.**

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