Take the "1 Minute Financial Challenge"

Client Login



Let our CFP® professionals help plan your future.

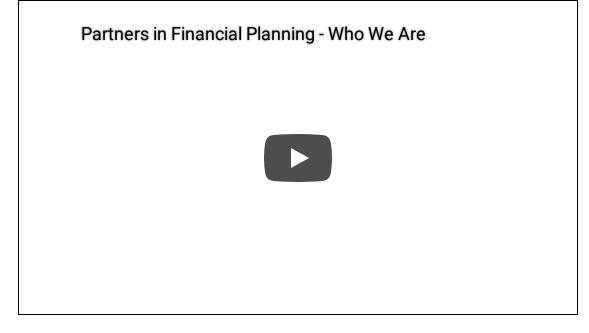
Click on the BBB logo below, to read reviews our clients have posted.



BBB Rating: A+ as of 7/8/2019 Click for Profile

Click here to download a complimentary report on how a financial planner can add value.

Click below to view an introductory video about how we can help you:



Are you a young professional? Click here to learn more about Financial Foundations.

Latest News and Blog

6-5-19 | The Value of a Financial Advisor

Consumer Alerts

New IRS Guidance on State and Local Tax Refunds U.S.-China Trade War: Who Pays the Price? Retirement Confidence

Increases for Workers and Retirees

1040 Postmortem: Making Sense of Your Taxes and Withholding

Connect with Us

Subscribe to our newsletter

Enter your email address below to receive our newsletter. This monthly newsletter will cover various financial topics, tips, and articles to prepare your finances for the future.

Email address:

Enter

Subscribe





FT 300 Ranking June 2017



About Us

Partners in Financial Planning, LLC is a Southwest Virginia-based fee-only financial planning and investment management firm. We strive to provide you with the highest level of personalized service and advice based solely on your best long-term financial interests. Our lead financial advisors are all CERTIFIED FINANCIAL PLANNER™ professionals. We serve many clients in the greater Roanoke Valley and New River Valley areas, including Salem, Lynchburg, Lexington, Blacksburg and Christiansburg – as well as clients in West Virginia and across the U.S.



FT 300 Ranking June 2015

©2019 Broadridge Investor Solutions, Inc.

Investment Commentary

Q2 Investment Commentary

How to make sense out of the recent market behavior? We experienced a painful decline in the last month of 2018 before the markets took a sharp (and unexpected) about-face and delivered the biggest one-guarter gain since the third guarter of 2009. The surprise upward trend has continued through the second guarter, albeit with more modest gains, despite what would normally be considered warning signs in the economy, the global trade markets and corporate earnings.

Download

May Investment Commentary

Stocks fell sharply in May, closing out their worst month since last December. Each of the benchmark indexes posted month-over-month losses exceeding 6.5%. While market performance has largely swung on trade rhetoric, it appears investors have reached their boiling point and are moving away from stocks and floating toward bonds, pushing yields on 10-year Treasuries down (-37 bps in May) as bond prices soared. Oil prices fell sharply on trade tensions and a slowing Chinese economy. For the month, small caps and tech stocks lost almost 8.0%, followed by the large caps of the Dow and the S&P 500. Year-to-date, only the Nasdag remains more than 10% ahead of its 2018 closing value.

April Investment Commentary

As April came to a close, each of the benchmark indexes listed here posted strong monthly returns. In fact, for several of the indexes, April brought to a close the best four-month stretch in many years. Both the Nasdag and S&P 500 reached new highs during the month, as investors were encouraged by a shrinking trade deficit, favorable economic projections, low inflation, and stable interest rates. The Nasdag led the way, nearing a monthly gain of almost 5.0%, followed by the large caps of the S&P 500, the small caps of the Russell 2000, the Global Dow, and the Dow, which gained over 2.5% for the month. During April, consumers saw gas prices climb as oil prices continued to soar.

Download

Download

421 S. College AvenueAboutValuesFeaturesServicesSalem, VA 24153Our FirmCore ValuesThe ProcessOur Services	Resources Employment
Salem, VA 24153Cur YumCorro tudooHist HotocolCur Corrot540-444-2930Our TeamOur FiduciaryThe First YearOur Serviceinfo@partnersinfinancialplanning.comOur ClientsOathWhat PeopleProfessionalPlanning. All rights reserved. NoticesOur ServiceCommunityOften AskOur Investmand DisclosuresProfessionalAffiliationsWhat to Explore	es Opportunities Fee Schedule als and Client Forms Web Links