CHAPEL HILL, N.C. FINANCIAL PLANNING

FEE-ONLY | COMPREHENSIVE | ONGOING

SCHEDULE A CALL (HTTPS://OLDPEAKFINANCE.COM/#CONTACTS)

WHY OLD PEAK

NO TWO CLIENTS ARE THE SAME

Every client relationship starts with a detailed financial plan. This takes about a month and involves multiple discussions with you and in-depth review of several dozen documents like brokerage statements, wills, tax returns and insurance policies.

NO COMMISSIONS

LONG-TERM, ACADEMIC VIEW ON INVESTING

CFP® PROFESSIONALS

Old Peak Finance Rick Waechter

WHO WE SERVE

(https://oldpeakfinance.com/busy-executives/)

BUSY PROFESSIONALS

PHYSICIANS & VETERINARIANS

OUR PROCESS

1. SCHEDULE A 15-MINUTE CALL

Schedule a free 15-minute call with one of our advisors to see if we are mutually a good fit to work together. If yes, we will schedule a longer data gathering meeting. If not, we will make recommendations to local firms that may be more suited for your situation.

2. IN-PERSON OR VIRTUAL GOALS MEETING

4. TAKE ACTION

5. MONITOR & UPDATE

Contacts

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