Securing financial independence for one client at a time.

INDEPENDENT ADVICE
FIDUCIARY STANDARD

Forness Financial LLC is an independent Registered Investment Advisory firm located in Needham, MA. Our wealth management team specializes in retirement planning and investment management. Whether you are already retired or need assistance getting there, we can help. We build investment portfolios that will help you reach your retirement goals and income-producing portfolios that will allow you to enjoy your retirement. We are fiduciaries for our clients providing personalized service and recommendations based on each client's unique needs and goals. That is what we mean by securing financial independence for one client at a time.

Learn more →

Business Philosophy

Our business is built on strong, long-term relationships with our clients. Our goal as a firm is to offer the best combination of services, products, and value. We adhere to a fiduciary standard always putting our clients first. We are solely a fee based firm so our only incentive is to help our clients grow their assets. We approach every client and prospective client with the highest degree of integrity, dignity, and empathy.

Investment Philosophy

Because Forness Financial is an independent firm, our investment options are virtually unlimited. This allows us to offer our clients the best of what is available without bias. We build fully customized portfolios based on each client's unique needs using no-load, institutional level mutual funds and exchange-traded funds (ETFs). We only use investments that allow our clients to maintain full flexibility and liquidity of their money.

Read More ⟶

Forness Financial

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We offer a complimentary consultation which can include a complimentary investment and cost analysis. Please call (781) 400-2604 or email us to learn more. Currently we are only accepting new clients with $500,000 or more in investable assets.