MILESTONE
Financial Planning, LLC

NEW ENGLAND FEE-ONLY FINANCIAL ADVISORS

# "We are with you for every milestone in your financial life."

FAMILIES / WORKING PROFESSIONALS

RETIRING SOON?

CONTACT US

## Financial Planning Value

# 1

Creation and maintenance of a goal-focused investment portfolio.

# 2

Integrated financial planning covering all aspects of your financial life.

# 3

Unlimited access, as needed, for any personal financial questions or concerns.

## Fee-Only Financial Advisors

Financial Planning and Investment Management. As fiduciaries we are required to put your interest above our own

SEE HOW IT WORKS

## Certified Financial Planners

You will work directly with one of our CERTIFIED FINANCIAL PLANNER™ practitioners and be supported by our entire team.

MEET OUR TEAM

## Experienced Tax Advice

We incorporate experienced tax advice into our financial planning, as taxes are an integral part of any financial planning
decision.

LEARN MORE

# Our Service Model

We work with clients on an on-going basis. With an annual financial planning subscription fee, and/or a fee based on assets that we manage, clients receive both financial planning and investment management, and have unlimited access to our advisors. We receive no commissions or referral fees. We put our clients' interests first.

LEARN MORE

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