BrokerCheck by FINRA

CROSSROADS
FINANCIAL MANAGEMENT

913-451-8370

How We Work

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of our foundation of success.

Our Approach

We create strategies that are tailored to your needs and goals.

LEARN MORE

Our Services

Years of experience have prepared us to guide you through your life transitions.

LEARN MORE

Our Mission

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

LEARN MORE

Our Resources

Want to learn more about retirement, social security, or estate strategies? We have a wealth of resources.

LEARN MORE

Unique Value Proposition

We are a boutique financial planning firm that custom designs comprehensive financial and investment plans to guide our clients' financial futures and help to relieve of financial uncertainties.

We identify where portfolios are vulnerable, have a detailed approach to investment selection and constantly monitor investment performance.

LEARN MORE

Crossroads Financial Management

We believe our teamwork approach adds a broader perspective to all we do and provides increased benefits to our clients.

We can answer your questions, including:

- Can I retire early?
- Are my investments working hard enough?
- What's a good approach for college savings?
- What are the elements of a sound estate strategy?
- Do I have enough life insurance for my family?

Our experienced professionals have helped many people just like you with similar issues and concerns. We can help you create an approach that is designed to address your individual situation.

MEET OUR TEAM

Download Our Tax Reform Ebook!

There's a lot of confusion around the new Tax Reform and Jobs Act. Luckily, we're here to help. This Ebook will tell you everything you need to know about the biggest tax overhaul in 30 years.

First Name

Last Name

Email

GET THE EBOOK

Contact

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