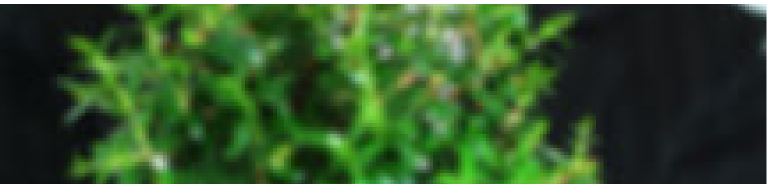
Patrick J. Reidy, JD/MBA
Three decades of client-only advice

Financial Planning For Every Need

The Parkridge Group, LLC

Experience, expertise and action-orientation to nurture successful financial results

Investment Management
Retirement Planning
Wills and Estates
Employee Benefits
Taxes



Retirement and Life Event Planning

Manage Transitions
Relocation
Career/Retirement
Marriage/Divorce
Children/Parents
Illness/Aging/Death

Investment Planning

Set Objectives/Policy
Investment Management Using:
Index Core/Satellite Strategy
Lower Costs Than Alternatives
Better Results From Personalization

Income Tax Planning &

Compliance

Return Preparation
Year Long Planning
Assure No Surprises
Minimize Liabilities
Make it Easy

Estate & Gift Planning

Establish Objectives
Create a Plan:
Document Preparation
Coordinate With Ownership of Assets and Beneficiary Designations
Maintain Records
Update as Needed/Desired

Contact Us

Get in touch to find how our services can benefit you and for a complimentary consultation.

Name

Email

Subject

Message

Send

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