

PLAN TO SUCCEED

Honoring our region's reputation as a global standard in academic excellence, technological innovation, and financial acumen, we deliver intellectually honest financial advice that employs the finest technology in asset management today, while honoring the time-tested principles that have helped investors sustainably build wealth for generations. Whether you're planning for retirement, funding a child's education, or simply ensuring you'll be protected if something goes wrong, we can help you organize your finances to meet your life goals.

CLIENT EXPERIENCE

Our boutique approach means you have a partner in the process of managing your finances: not an 800 number, but a Certified Financial Planner™ to answer your questions and help you navigate life's financial challenges.

INTELLECTUAL HONESTY

WWW.FINANCIALPLANNINGINSTITUTE.COM

DUE DILIGENCE

No two people are the same. Your finances, goals, and relationship with money are all unique. We understand the importance of listening carefully to your needs and objectives. Then taking the time to thoughtfully address each one.

TRANSPARENCY

THE FINANCIAL PLANNING INSTITUTE

We can't predict the future, time the market, or pick the next hot stock. History has shown that attempting to do so is a losing game. Instead we believe in offering candid analysis of what your investments can do for you and what you must plan to do for yourself.

INDEPENDENCE

As an independent wealth management firm we deliver unbiased counsel because we're not owned by a large brokerage house, insurance company, or public shareholders. We are fiduciaries paid *by* our clients to work *for* our clients.

The less you pay for financial management, the faster your wealth can grow – a simple truth that inspired our business model, fee structure, and portfolio solutions. We're proud to highlight the cost of our work and help you compare the alternatives.

INNOVATION

While the core principles of sound investing are timeless, the products and technology available to execute those principles are constantly evolving. We are committed to implementing the best of these innovations to benefit your bottom line.



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