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IT ALL STARTS WITH YOUR

COMPREHENSIVE FINANCIAL PLAN

Learn More (/financial-planning-philosophy)

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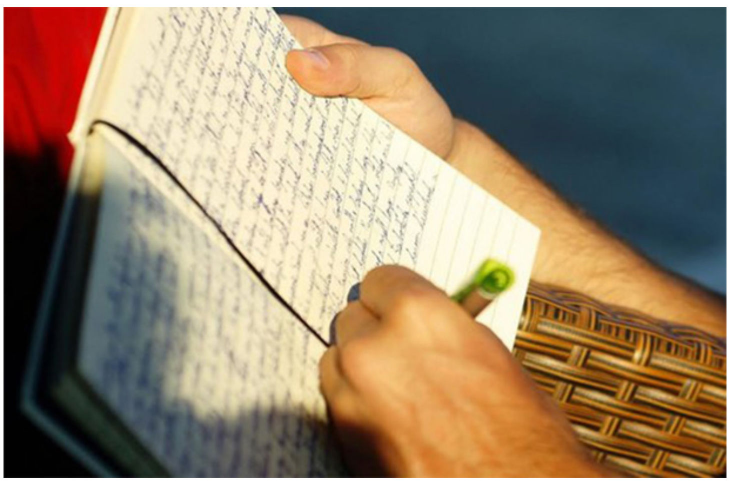
WHAT INTERESTS YOU TODAY?

Asset Protection

A comprehensive risk assessment is essential to any financial plan. Proactively addressing key risk factors can help protect you and your family from undue hardship if tragic events like death, disability or critical illness strike.

Does my Portfolio Fit Me?

Investment strategies are designed to be maintained and updated over time. Use our free analysis tool to see if your existing portfolio is aligned with your current risk tolerance.



Estate Planning Guidance

We can provide guidance on intergenerational planning to help manage your legacy and/or collaborate with your existing estate planning professional to minimize the possibility of something falling through the cracks.

Looking to learn more?

Get in touch today

Contact Us (/contact-us)

Latest Blog Posts

Fireworks, Fun and Fanfare for the Fourth! (/blog/fireworks-fun-and-fanfare-fourth)

(/blog/fireworks-fun-and-fanfare-fourth)

Please note that our office will be closed July 4-8 in observance of the 4th of July holiday. We will also be closing early in the afternoon on Wednesday, July 3.

Parades, Picnics, Parties and Fireworks…summer is finally here, and it's time to celebrate the July 4th holiday!

Tags:
Fourth of July (/category/fourth-july) Independence Day (/category/independence-day)
Tim McCarthy (/category/tim-mccarthy)

Read more (/blog/fireworks-fun-and-fanfare-fourth)

Graduation and New Beginnings (/blog/graduation-and-new-beginnings)

(/blog/graduation-and-new-beginnings)

Rodgers and Hammerstein made June famous for “bustin’ out all over,” but in my mind, this month is linked to Graduation Season and visions of the graduate heading off to conquer the world. I think the phrase “develop a killer app” is the 2019 equivalent of “Plastics, my boy, plastics.” For the graduate, the prize is at hand and the fruits of

Tags: graduation (/category/graduation) Tim McCarthy (/category/tim-mccarthy)

Read more (/blog/graduation-and-new-beginnings)

Honoring and Remembering Those Who Serve (/blog/honoring-and-remembering-those-who-serve)

(/blog/honoring-and-remembering-those-who-serve)

Our newsletter enjoyed a “Spring Break” during tax season, and now we will resume our client newsletters on a twice monthly schedule. These communications are intended to be an opportunity for you to get to know our staff on a more personal level, as well as for us to share with you some timely tax and financial information.

Tags: Memorial Day (/category/memorial-day) Tim McCarthy (/category/tim-mccarthy)

Read more (/blog/honoring-and-remembering-those-who-serve)

Additional info

Sitemap (/sitemap)

Legal, privacy, copyright and trademark information (/legal-privacy-copyright-and-trademark-information)

Contact info

30 Tower Lane, Avon, Connecticut 06001

860-676-8635

tim@uswealthfarmingtonvalley.com (mailto:tim@uswealthfarmingtonvalley.com)

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