Ready To Breathe Life Into Your Financial Plan?

An exceptional life starts with an exceptional plan.

Schedule An Appointment

Effective Game Plan

Advice In Common Language

Straightforward Fees

You Deserve To Understand What's Happening With Your Money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life and your future.

At Abaris Financial Group, we believe clients should understand everything that is happening with their money; that advisors should be just as good about explaining investments as they are at making them.

1

QUESTION

What are you going to do with my money?

First, we're going to get to know you and discuss what's most important to you. We're going to figure out your goals and the outcomes you'd like to achieve with this money. We'll do this by establishing your Family Index Number, which is the rate of return needed on your investments in order to pursue those outcomes. After we determine your Family Index Number, we allocate your money to our various investment strategies designed to help you pursue those goals.

2

QUESTION

Can you handle the complexity of my situation?

We work with a wide variety of clients – everyone from high net worth investors to those who are just starting out. While each family gets a personalized allocation strategy, we've helped thousands of families navigate their complex financial needs and guided them through life's major decisions.

3

QUESTION

How can you make my life easier?

As your trusted advisor, we're focused on adding convenience and simplicity to your lives. We will make sure you're educated on your investments and how we manage your money – as much or as little information as you'd like.

Whether you're investing hundreds or millions, at Abaris Financial Group we're about much more than results – we're about helping you understand where those results have come from and why the strategy works. If you're tired of the mystery of investing and want to know exactly what's happening with your money, schedule an appointment today.

Forbes

BARRON'S HALL OF FAME

InvestmentNews ICONS & INNOVATORS

Discover The Right Investment Strategy For You.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

More than 8%

Next

Let’s Build The Future You’ve Earned. Together.

Our mission is to change lives by bringing personal fulfillment and a lasting legacy to our clients through comprehensive, fee-only financial planning, life planning, coaching and investment management services. Abaris Financial Group is a wealth management firm based in Concord, Massachusetts, serving affluent individuals and families.

Contact us today and let Abaris help you on your True Wealth journey.

Contact Us

Are You Ready To Join Us On This Journey?

Schedule a complimentary financial life plan discovery session with us to learn more about the benefits of financial life planning.

First Name*

Last Name*

Email*

Phone Number*

Submit

Our Financial Planning Services Are Built On Trust, Transparency and Accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams.

Explore Services

Financial Life Planning & Coaching

Your life and financial goals are forever intertwined. Your portfolio shouldn't represent market whims, or even what your advisor prescribes, but who you are.

Traditional Wealth Planning

Traditional wealth planning is the foundation of all that we do. We follow a 4-step process to create a customized roadmap to achieving your goals.

Life Transition Planning

Change can be challenging even in the best of circumstances and having an experienced trusted advisor to help you navigate uncharted territory can reduce your stress and make for a smoother experience.

Estate, Tax & Philanthropy Planning

Creating a legacy gives meaning to life. What is important to you?

Portfolio Management

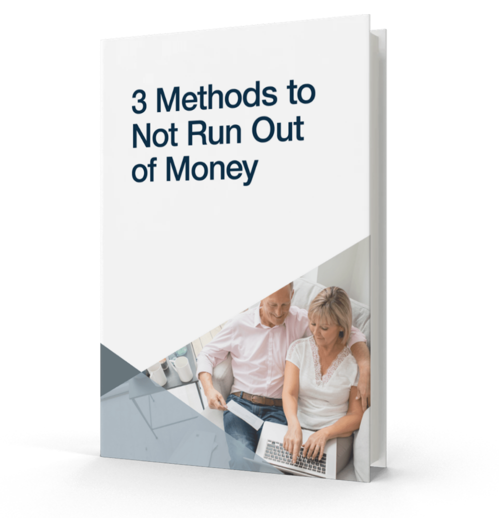
The Abaris team sees investments and portfolio management as an important tool to help you

Private Trust

One of the most important decisions in estate planning is who to name as trustee.

you want to be remembered?

Download One Of Our Free Guides.



3 Methods to Not Run Out of Money

What’s the #1 fear in retirement? Running out of money. Get our step-by-step guide to help ensure your assets last a lifetime.

Download Now

4 Mistakes People Make With Their First Million

Identify the next set of challenges you may face and avoid these common mistakes. Get our step-by-step guide to focus on turning your first million into two.

Download Now

Insights

Abaris Financial Group's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need.

Read More

Market Commentary

Weekly Market Commentary – July 8, 2019

The S&P 500 continued its very strong performance this year and reached a new high Wednesday before inching lower on Friday. The strong employment report on Friday pushed markets slightly lower by reducing the number of expected interest-rate cuts by the Federal Reserve. The S&P 500 climbed 1.7% for the week. The MSCI ACWI gained 1.2%. The Bloomberg BarCap Aggregate Bond Index slipped 0.1% as yield rose in response to the jobs data.

Read more

Blog post

How to Buy a Car Without Losing Your Mind (or Your Wallet)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It's painful and annoying, I know I have to deal with it, but it's going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

Weekly Market Commentary

Weekly Market Commentary – July 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

Read more

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