

# Building wealth with your personal interests and goals in mind.

What are your financial goals? We know that planning for your financial future can be complex and getting started can be difficult – let us guide you to financial freedom.

[Arrange An Introductory Conversation](#)

Not ready yet? Read [Keys to Hiring a Financial Professional](#).

## Passion - Knowledge - Caring



### Passion - Knowledge - Caring

from [THOR Investment Management](#)

02:00 |



# **Our Services**

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For the past 25 years, THOR has helped over 500 people, just like you, find financial security. In fact, CNBC has named THOR one of the [top 100 fee-only wealth management firms](#) in the country.



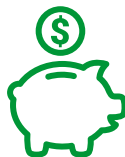
## **Financial Planning**

Building an appropriate financial plan is the place to start. All other financial decisions follow from this plan to protect your interests while building and preserving your overall wealth.



## **Investment Management**

The right mix of investments is a key piece of your long-term financial success. Since our inception in 1992, THOR has utilized our proprietary investment model to help achieve the right mix of investments for our portfolios.



## **Retirement Planning**

Years before retirement, careful thought and planning should be given to how your life savings will be spent when your career is over. How you navigate the tax laws can significantly impact the long-term savings for you and your family.



## **Estate Planning**

How will you protect your assets and your heirs from huge tax liabilities and probate court problems? Taking the right steps to maximize the wealth transfer to your family takes careful planning and execution.



## **Business Advisory**

Whether growing, buying, or selling a successful business, the financial and legal strategies associated with the business have great significance for your long-term planning. THOR works closely with business owners and executives when important decisions need to be made.



## **Tax Planning**

Taxes impact virtually every aspect of our life, regardless of income level. Proper planning is critical to making accurate investment and financial decisions.

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# 3

## Easy Steps

# 1

We want to get to know you! Arrange an introductory conversation.

# 2

Work together to determine what THOR can do for you.

# 3

Begin your path to financial freedom!

**Arrange An Introductory Conversation**

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## Who We Are

All of us at THOR are very passionate about what we do and we strive to make the best financial decisions for you on a daily basis. We hope to be your financial advisor for life, offering support for all of your key financial decisions along the way.

# 500+

CLIENTS GUIDED

# \$350<sup>M</sup>+

ASSETS MANAGED

AS OF 4/1/18

[ABOUT US](#)

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06/21/19

### **3 Keys to Understanding Credit Scores**

What is a credit score? A credit score is a three digit figure that is

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One topic that often is overlooked when it comes to personal finances is

risk exposure. Risk is why all sorts of insurance products exist. Sure,

we know we need car insurance in case we are in an accident and medical insurance in case we have an accident or severe illness. ...

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## Market Updates

We spend a lot of time studying the market and we share our thoughts via email. If you would like to learn what we think, please enter your email address below for occasional updates.

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## WANT A CLEAR PLAN FOR YOUR FINANCIAL FUTURE?

[Arrange An Introductory Conversation](#)

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