

**“GO CONFIDENTLY IN THE
DIRECTION OF YOUR DREAMS.
LIVE THE LIFE YOU
HAVE IMAGINED”**
H.D. Thoreau

Call Us 845-638-6505

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Learn from my experience... not your mistakes!

Are you on the right financial path? You think you're doing all the right things... or maybe you're not so sure... but do you really know?

Accomplishing "The Big Three" is what's important to most families. Educating your kids... securing your retirement without being dependent on your kids... providing care for your parents, if needed.

Everyone has a lot of financial "stuff" in their lives. Savings accounts, IRA's, 401k's, company pension plans, investment accounts, current or future social security, education savings plans, all kinds of insurance, wills and the desire to reduce income taxes to the minimum possible.

Do you have a forward looking view to determine if your "stuff" puts you on the path to achieving "The Big Three" and living the life you have imagined?

Don't panic... very few people do and that's where I come in!

Let's discuss what's important to you, your family, where you've been, what you've done and where you want to go. I'll listen to everything you've shared with me and show you what your financial future looks like.

Most importantly, I'll provide alternative strategies to help you improve your current situation, achieve your goals, help you navigate through life's unforeseen obstacles and keep you on your path throughout the years to come.

Pursue your passions and let a retirement planning expert secure your future, save you time and save you money. Learn how you can avoid the conflict of interest advice provided by Wall Street, Mutual Funds and the Media.

Profit from my experience helping people throughout the United States create and maintain their wealth over the past-twenty-nine years.



Schedule your meeting or telephone consultation now...

Call Keith at **845-638-6505**

Phone: 845-638-6505 | Address: 4 Pippen Place | New City, New York 10956 | Email - info@thecompletefinancialplan.com

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