



HERE TO SERVE

OUR SERVICES

See how we may serve you today

Business Planning (/business-planning)

The NFA works with your legal and accounting team to structure business entities and operations in the most effective manner. We separate risks and protect operations by effective entity creation and restructuring.

Wealth Management (/wealth-management)

We review, monitor, trade, and manage a client's investable assets. We pick the most appropriate custodian, investment vehicles and evaluate market conditions to allow us to invest based on the client's risk tolerance and objectives.

Individual Planning (/individual-planning)

It is important for us to understand each client's goals, dreams and objectives. We want to know what we are trying to accomplish on their behalf. We work with our clients to make sure they have clear budgets that are flexible enough for life's challenges, yet complete enough to help them build toward their goals and dreams.

LEADERSHIP



(/team-member/reagan-wagner)

REAGAN WAGNER

CEO, President

Principal

Learn more

(/team-member/reagan-wagner)



(/team-member/kristen-wagner)

KRISTEN WAGNER

Chief Operating Officer & Partner

Learn more (/team-member/kristen-wagner)

Our Team (/our-team)

Looking to learn more?
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Message

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