

Comprehensive Planning Is at the Heart of
Financial Success

Welcome to United Financial Planning Group

We are a Fee-Only, Fiduciary Firm dedicated to providing sound, impartial financial advice. Our [tight-knit](#) team of CERTIFIED FINANCIAL PLANNER™ professionals and CPA's work together to turn your retirement goals into a retirement plan.

Where are you on the road to retirement?



Just Getting Started

Maybe retirement planning has not been at the forefront of your mind, and that's okay. You are just starting to think about balancing and investing your retirement savings with current family expenses.



Meeting the Finish Line

Schedule a Time to Chat

You are getting closer and closer to retirement, which means it is time to fine-tune your goals. Honing in on your retirement strategy now can help reduce your risk of running out of money later.



Enjoying the Golden Years.

You have spent decades accumulating wealth in preparation for retirement. The time is finally here, let's put a retirement distribution plan in place to protect the assets you have worked so hard to obtain.

Here's How We Can Help

SERVICES & FEES

Schedule a Time to Chat

888 Veterans Memorial Hwy,
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LAKE SUCCESS LOCATION

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NYC LOCATION

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[Schedule a Time to Chat](#)



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