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- Daniel J. Murphy, CFP®

When people think about wealth management, they typically think about money. At Murphy Wealth we take a different approach. We feel that wealth management starts with a deep understanding of and caring for our clients on a personal level. While creating strategies and recommending investments are part of the overall approach, it all begins by understanding you on a meaningful level. We take the time to listen carefully and ask the right questions. We learn about all aspects of your life: family, personal goals, goals for retirement, legacy needs, and tolerance for risk. Only then can we put a plan in place to help you pursue both your short- and long-term goals.

People come first . . . strategies second.

The Making of a Financial Planner - My Story



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SOCIAL SECURITY OPTIMIZATION



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60 Merritt Boulevard

Suite 106

Fishkill, NY 12524



LPL Account View

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