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Is your nest egg prepared for major life events?

- **Disability**
- **Death of spouse**
- **Loss of job**
- **Medical Emergency**
- **All of the above**

LIFE EVENTS **BUSINESS VS PERSONAL WEALTH** **RETIREMENT DREAMS** **FINANCIAL FUTURE**

As featured on:

The Washington Post CBS Washington Business Journal Wall Street Journal abc Yahoo!

Investor Case **Studies**

“Former Advisor put our cash in a cookie-cutter investment plan and we wanted to find alternative options. WiserAdvisor helped us connect with Brian who had clients similar to our situation.”

Profile: Susan is in her mid 60s, retired school teacher, married, has grandkids and loves gardening and is involved in her church community.
Portfolio Size: $200K in 403(b) and $35K cash to invest.

Financial **Articles**

What To Do If Your Employer Doesn't Offer a 401k Retirement Plan?
Everyone knows the importance of saving for retirement. As a rule of thumb, the earlier you start saving, the better it is - thanks to the power of compound interest. Many financial experts' advice their clients to plan for their retirement right...
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7 Key Steps To Create A Good Estate Plan
Estate planning is a wise thing to do to ensure that your family and loved ones are safe and at the same time save them from unnecessary stress and headaches during an extremely difficult time. A comprehensive estate plan is more than just the...
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What Does Per Stirpes And Per Capita Mean For Beneficiary Distributions In Estate Planning?
Estate planning is a stressful process, but it is one of the necessary life steps which you need to take. When you start working with the attorney for estate planning, you will often hear some of these commonly used terms such as per stirpes and per...
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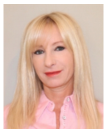

Hilary OMalley BFA®

Financial Advisor from Plymouth,MA

Comprehensive financial Planning focusing on a long term approach that helps our clients prepare for the future and the possibility of unforeseen events.

Other Plymouth, MA Financial Advisors

Glen McLaughlin

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Buoyant offers end-to-end, holistic financial management through a process that will grow, change, and flex as you and your financial situation evolve. We begin by establishing a relationship,...

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The experienced professionals at Freedom Wealth Alliance can help provide clarity to your financial objectives and direction toward your goals. Our guidance is delivered with a level of integrity...

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Financial Advisor from Salt Lake City,UT

The Financial Insight Center is a fee based Investment Advisory firm located in Salt Lake City Utah. Clients choose us for our customized approach to financial planning and wealth management. We...

Other Salt Lake City, UT Financial Advisors

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Financial Advisor from Norcross,GA

Financial Clarity Partners helps people make the most of their life and their money. We are an independent financial planning firm that offers affordable financial planning and advice to anyone...

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Other Loveland, CO Financial Advisors

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Fisher Investments is a privately owned, independent, fee-only Registered Investment Adviser that has helped investors achieve their financial goals for over 40 years. As of 3/31/2019, Fisher...

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Kraig McFarland

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The first thing you can expect is a conversation about where you are and where you would like to be. We create a personal financial plan based upon your goals that will be our guide going forward. A...

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Additional **Resources**

Top Financial Concerns

Advisor Compensation

Advisor Credentials

Retirement & Healthcare

Retirement Changes: Health Care, Social Security, and Medicare in 2014

How much do you know about the three largest learning curves that most retirees must face? In dealing with health care costs, Social Security, and Medicare, there are hurdles that can entangle even the savviest retirement-planner, especially when it comes to tracking rules and yearly changes...more

Saving & Investing

How do you choose an optimal combination of investments to help you reach a goal that may be decades away?

When faced with all the decisions that need to be made to ensure you select the proper investments to meet your long-term financial goals, it's easy to become overwhelmed. The answer is to focus on the fundamentals. Make sure to get these basics right...more

Outliving Nest egg

Personal Assets and Investable Assets: New Retirement Income Trends.

As financial experts sound the warning bells about the American retirement planning crisis, and how little the average worker has saved toward his or her golden years, all kinds of questions abound -- what exactly do retiring workers have squirreled away to provide for them when they quit working...more

Business to Personal

5 Key Steps In Planning Your Business's Legacy

When you build a business, you're not simply fulfilling a vision while earning a living; you're also creating a legacy. Enter succession planning: the process of preparing to hand over your company to future leaders. Let's look at how you should start preparing for your company's future management...more

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Our Advisor Match Service is free to consumers. Advisors do pay a fee, once they qualify, to be a part of our network.

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