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CALLAHAN FINANCIAL

(513) 421-0800

For more than 30 years, Callahan Financial has provided families and small businesses with financial advocacy, collaborative problem solving and vision casting for the future.

Services We Provide That Support This Process:

- Financial Planning* for your specific needs
- Transition and Retirement Planning
- Asset Management*
- 401K, IRA, SEP, 403(b) and a variety of other accounts (start up, rollover and consolidation)
- Insurance and Risk Management
- College Education Planning and Solutions
- Senior Care / Parent Care Education and Strategies
- Trust Services**

Securities Offered Through LPL Financial, Member FINRA/SIPC. Investment advice and planning offered through WealthCor LLC, a registered investment advisor. WealthCor LLC and Callahan Financial are separate entities from LPL Financial.

**LPL Financial Representatives offer access to Trust Services through The Private Trust Company N.A., an affiliate of LPL Financial.

Who we are

As an independent firm, we are committed to offering complete objectivity and unbiased advice.

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What we do

Our educational approach takes the mystery out of investing, insurance, estate conservation, and preserving wealth.

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How we do it

We strive to build long-lasting relationships with our clients, offering ongoing education and guidance.

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Name

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Phone

Question

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Contact

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