Westward Financial Strategies and Lifestages Financial Planning are combining into one full-service financial firm as a part of our commitment to helping you, our clients, and your referred friends and family define and progress toward your financial goals. We know that some days you want to retire "yesterday". Other days you feel like you could work for as long as your health will allow. The truth is none of us knows when we will actually retire because there are elements we simply can't control. For the elements we CAN control, we utilize our Principals' combined 40 years of planning experience and a rules-based system to craft an investment plan to help you invest more fearlessly. For the elements we can't control, we design an insurance plan that makes sense to help you keep the ground you've gained toward your financial goals. For the unknowns where we cannot predict or insure, we build contingencies into your plans to help you have the flexibility to handle life as it unfolds.

One thing our clients have taught us over the years is that we all have different ideas of what success looks like. It takes more than numbers to feel confident about where you are -- It takes a plan. It also means working with your other professionals -- your estate planning attorney, your tax advisor, and others, to make sure that you're making smart moves to minimize taxes and to ensure an orderly administration of your medical and financial affairs in the case of a disability or your death. We work with your other advisors to help you take the steps to get your life in order and communicate it to those who you've decided need to know. Think of it as continuity planning for your life. How will your business run, your household run, who will care for your pets when you can't? (you must name someone!)

We offer a wide range of financial products and services to make sure that anywhere you can help it, your life's work is not left to chance. You've used your talent, your time, and invested emotionally in the life you've built. We help you make the most of the fruits of your life by showing you how to grow your finances and protect those you love who you want to benefit from your life's work. It is our goal that through working with us, you gain the confidence that comes from knowing you can deliver on the important promises you make to yourself and those who count on you, day in and day out.

We hope you will find this site useful and will make it one of your resource centers. We choose to grow by referral so that our time is spent bringing the high level of service you have come to expect from us. If you know someone who can benefit from our level of service, please tell us about them so that we can reach out to them to see if we are the right match for their needs.

We serve individuals and business owners in all areas of financial planning, including:

Investment Management*
Full financial planning
Business buy-sell planning
Goal-based financial planning (college, retirement, business succession)
Retirement Strategies
Estate Planning & Administration
Life, Disability and Long-Term Care Insurance and Annuity Products
Alternative Investments
1031 programs

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