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in

📞 623 878-6470

We help Business Owners establish or change 401k plans, as well as Professionals, Retirees, & Widows prepare for a financially independent retirement.

Welcome, I'm David Lesnick, a financial professional in Glendale, AZ. We understand that individuals face unique challenges as they prepare for retirement. We can help take the mystery out of preparing for today and tomorrow. Whether your goal is saving for retirement, college savings, or estate strategy, our personalized service focuses your needs, wants, and financial goals and objectives.

Our professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you through all stages of your life, please call 623-640-7785.

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Our Process

We create strategies that are tailored to your needs and goals.

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Our History

Years of experience have prepared us to guide you through your life transitions.

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Our Values

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

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Sound Financial Strategies For Today's Markets

We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

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Your Road-Map To Endless Horizons

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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"Remember, what does 'retirement' mean? It doesn't mean that you're a couch potato. Leisure is not the same things as rest. If you're bicycling five miles a day, that's leisure, but it certainly takes a lot of effort."

Robert Fogel

Have a Question?

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