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☎ 713-893-5839

## Welcome to Financial Success Strategies!

We want your visit to be engaging and to give you valuable tools to create a financial strategy designed to help you meet your specific goals.

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## **Our Process**

We offer our clients sophisticated and comprehensive financial planning services.

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## **Our Services**

Our services include planning for retirement accumulation and income, risk management, estate and charitable giving, taxes, long term care, college, and business succession.

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## **Our Values**

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

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## **Let me help you achieve financial success!**

I am Shelley L. Nadel, CFP®, ADPA®, LUTCF, Financial Advisor. I founded my independent financial planning practice with one purpose in mind: to give my clients the most transparent and comprehensive advice possible and help guide them to a financial plan that focuses on their needs specifically. We never take a "cookie cutter" approach to identifying financial solutions; every client is different, and we work with you accordingly.

We offer our clients sophisticated and comprehensive financial planning services, including planning for retirement accumulation and income, risk management, estate and charitable giving, taxes, long term care, college, and business succession.

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## Your Financial Future

My passion is helping professional women and their families, as well as small business owners, apply the same excellence to their personal finances that they use every day to succeed in their work environment. We will treat you like adults and not try to impress with fancy lingo. Rather, we will give you straight talking advice about how to lead a successful financial life and be in control of your money rather than the other way around. We will give you the best advice we can and then help you implement the strategy you choose to pursue.

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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."*

## Please let us know how we can help!

Name

Email

Message

**SEND**

**We hope you have a fabulously successful day!**

### Contact

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FINRA Series 7 Registration

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