

Helping busy people make **smart** financial decisions



Trust. Fairness. Expertise.

When it comes to managing your financial situation, pick the team that puts your interests first.

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Real Planning.*

We have a clearly defined process to assess your situation and build a plan that shows you where you stand and what you need to do to achieve your goals. We've prepared hundreds of plans. Let's talk about developing yours.

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Our highly-disciplined, academically-based investment process removes much of the harmful behavior that can result from the fear of loss. We mutually develop your customized portfolio so that you can remain comfortable with how your money is

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1001 N. University Avenue, Ste. 200 Little Rock, Arkansas 72207 Tel. (501) 376-9051 Fax (501) 376-6356
info@ARfinancial.com

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