

LIFE IS FOR LIVING

WE BUILD OPEN, CARING RELATIONSHIPS SO WE CAN HELP YOU REACH YOUR FINANCIAL AND LIFE GOALS

We have been investing in our clients since 1995

At Investment Planners, we know that everyone wants to feel comfortable about making financial decisions, and our goal is to make you comfortable while we walk down that road together. Time is a precious commodity and we want you to spend your time living life, while letting us do the research and working on your behalf to put the pieces of your financial plan together.

Our planning processes begins with a conversation and a yellow pad, while we work to get to know each other, talk about where you are now, and where you want to go in the future. This discovery process will lead us to address the following:



Financial Planning

Working with a CFP® to uncover your goals and create a comprehensive financial plan, tailored to you.



Portfolio Management

Understanding your goals then choosing the investment mix that best fit those goals.

Life Insurance

Finding the right protection for your family and their future.



401K Management

Helping you turn your career savings into an income stream during retirement.



Estate Planning

Ensuring you have documents and beneficiaries in place to carry on your legacy.



Education Funds

Helping to establish 529s/ESAs/Roth IRAs for your children's future.



Christine A. Rondeau, CFP®

YOUR FUTURE STARTS WITH TAKING THE FIRST STEP

Start planning with us today. We offer a free-consultation, because we believe in building a relationship first.

Let's Make A Plan For You



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YEARS EXPERIENCE



0

FAMILIES SERVED



0

MILLION IN ASSETS MANAGED



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