

PERSONAL FINANCIAL PLANNING

401(K) ADVISORY

FINANCIAL EDUCATION

### **Make Smart Choices**

Wise Planning helps people make informed financial decisions and reach their goals.

### **Simplify Your Life**

We take the time to understand your unique situation and develop strategic solutions addressing a range of financial matters. By managing the details, we simplify your life.

### **Ignore the Wall Street Noise**

You can achieve financial success by focusing on the things that can be controlled – [personal goals, costs, risk, tax efficiency and effective implementation and monitoring of your plan](#).

### **Objective Guidance**

As Fee-Only advisors, Wise Planning clients pay us directly. We receive no commissions or remuneration of any kind from the financial services industry. With this undivided loyalty we recommend only cost-efficient financial products that best serve our clients interests.