Pivotal Planning Group

Call us at: 1-516-333-6565
Follow us on:

Personal Financial Planning

401(k) Plan Consulting

The Intelligent Choice

Pivotal Planning Group, LLC is a SEC Registered Investment Adviser and Fiduciary to 401(k) and Retirement Plans. We are dedicated to helping individuals, plan sponsors and trustees achieve their goals through education, prudent planning and unbiased advice.

We remain focused on two key areas of expertise; Personal Financial Planning and 401(k) Retirement Plan Consulting. We are one of the few firms on Long Island that is committed to acting in a fiduciary capacity with every client we engage.

As a privately owned and independent consulting firm we don't have the typical conflicts of interest or hidden agendas as found at large financial institutions. This structure is intentional; it assures our clients that as a fiduciary to them, any advice they receive from us always remains objective.

"Simply stated, your best interests always come first"

Our Fiduciary Oath

We exist to help our clients achieve their goals through education, prudent planning and unbiased advice.

We are committed to advising our clients in a fiduciary capacity, simply stated, your best interests always come first.

We will avoid conflicts of interest and immediately inform you if any should arise that would affect our impartiality.

We do not receive compensation from the sale of securities or other investment products.

 IMPORTANT DISCLOSURE INFORMATION

Back to Top