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WELCOME TO LIFETIME FINANCIAL STRATEGIES

Home of the "Whole Person" planning



We Focus on the Whole Person

We're an independent financial services firm committed to a unique approach to working with clients.

Our "Whole Person" approach is based on the three core beliefs:

- Time is our most precious asset
- We should spend our time on what matters most to us
- Financial planning is a process, not a result

- Reduce your worries and distractions
- Focus on what matters most to you
- Create the life you envision for yourself
- Achieve financial independence
- Improve your results

How We're Different



Our Process

We create strategies that are tailored to your needs and goals.

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Our History

Years of experience have prepared us to guide you through your life transitions.

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Our Values

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

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Our Resources

Want to learn more about retirement, social security, or estate strategies? We have a wealth of resources.

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Have a Question

Name

Email

Question

SEND

Contact

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