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Financial Planning **About** Portfolio Management Services Education Center

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Complete Financial Planning Services

In order to assist you in achieving your financial goals, Dash Investments offers a full range of built-in financial planning and advisory services. We believe that assisting our clients to reach their goals requires going beyond basic investment management. Find out how our expert Financial Counselors can help you get where you want to go.



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While many investment advisors tend to manage client assets as a pool, we take a different approach. Building a portfolio tailored to you and your needs is our specialty. You need to make sure your money is working to help you reach your goals, not someone else's. Find out how Dash Investments can help you create a portfolio customized to you, not your advisor.



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Proper guidance and planning can make all the difference in your retirement success. Whether you are already in retirement, nearing retirement, or want to start planning now for this important life event, our retirement planning experts are well equipped to help you construct a sound retirement plan that will give you the peace of mind you need.

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5 STEPS

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for SELECTING



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Jack Waymire & Jonathan Dash

A SEQUEL TO *WHO'S WATCHING YOUR MONEY?*



5 Steps for Selecting the Best Financial Advisor

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We wrote the book on what makes a great financial advisor

This book, written by Jonathan Dash, our Founder & Chief Investment Officer, helps you use the internet to find,

research, speak with and interview 100,000+ advisors (at the best price) and Find Your Local Advisor (<http://www.dashinvestments.com/findanadvisor>)

due-diligence expert. All you need is the patience and discipline to follow the steps in this book. Read More!

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Our Services (/our-services/)



Education Center (/education-center/)



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