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Health Management

Provide us with information on where you are in life now, where you hope to go down the road and what your financial goals are. We then take your information and design a unique investment approach to managing your wealth that will help you meet your future goals while keeping your current needs in mind.

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Welcome to Core Capital Solutions

Our clients work with us for many reasons...



Our Services

[WEALTH MNGT](#)[LIFE AFTER 65](#)[QUALIFIED PLANS](#)

Because they value long term, personal relationships....

Our clients still want an advisor they can meet with periodically to review their portfolio, to discuss their planning needs. Social networking has its place, but for our clients, the personal touch still has value.

Advisors from Core Capital Solutions meet personally with clients every quarter.

Because they were referred by a family member, friend or....

Many new clients are sent to us by our existing clients or another professional we've had the pleasure to work with. To us, that is the nicest compliment we could ever receive!

The Core Capital Solutions business was built referral by referral.

Because they are close to retirement and realize the importance of...

Designing an income plan that reduces the risk that you will run out of money before you run out of life takes careful planning. How much can you withdraw each year from your retirement accounts? When should you begin taking Social Security? What will health care expenditures be after retirement and how can I better plan for them? How can I balance the need for a comfortable retirement income and my desire to leave a legacy behind for my family.

Core Capital Solutions designs and implements individual retirement income plans for our clients.

Because they believe their time is better spent enjoying life...

Many of our clients would like to manage their own financial affairs but find that something always gets in the way...life. They work with us so they can get on with so many other things they want to do.

Core Capital Solutions frees up its clients to do what they really enjoy doing. After all, your money should free you up, not tie you down.

They need sophisticated tax planning..

Core Capital Counselors have extensive planning backgrounds and are CPAs. That may not make us fun at parties but we know that what is important is not what you make and save but what you ultimately keep after taxes.

At Core Capital Solutions we recognize the damage that taxes can do to the growth of our clients' portfolios.

Retirement health care costs are skyrocketing...

Many of our boomer clients have found themselves responsible for their parents financial and health care planning. We are expert at assisting clients with both.

For seniors, health care costs are consuming more and more of the income. We help our clients (and their parents plan) for what may be their largest expense in retirement.

Now you know a little about us, [tell us about yourself](#) and what we can do to help.

The only reason for time is so that everything doesn't happen at once. – Albert Einstein



Fiduciary Investment Advice

Who We Are

Core Capital Solutions LLC is an investment advisory firm registered with the Securities and Exchange Commission. [Find Out More](#)

Our Approach

Core Capital Solutions occupies a unique place in the world of investment management. Our investment style cannot be fit into a nice, neat box. [Find Out More](#)

Why Choose Us?

We thrive on the challenge of coming up with unique solutions to our clients' individual problems. As your fiduciary, our sole responsibility is to you. [Find Out More](#)

Let's Get Acquainted

We offer a complimentary "Get Acquainted" meeting to describe our services, and to see if our services are right for you. [Contact Us](#)

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