



LIM FINANCIAL GROUP

WORKING TOGETHER TO SAFEGUARD YOUR FINANCIAL FUTURE

in f

☎ (410) 415-5000



Our Process

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

[LEARN MORE](#)





Our History

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

[LEARN MORE](#)





Our Values

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

[LEARN MORE](#)

WHERE DO YOU WANT YOUR FINANCIAL ROADMAP TO TAKE YOU?

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

Just about everyone has a different opinion on how you should invest or manage your money. With so much contradictory advice, you may have a hard time confidently deciding what will work for your personal situation. Every person is unique and has their own definition of financial independence, which means no one financial strategy fits all.

At Lim Financial Group, we strive to create a personalized financial roadmap that may guide you toward your desired destination. We seek to simplify complex financial terms and investment options, offer honest advice, and help you navigate the complexities of investing and financial strategies. In all we do, our goal is to humbly serve you by nurturing long-term relationships built on trust and performance.

[LEARN MORE](#)

ARE YOU RETIREMENT READY?

Without a roadmap, the path toward and into retirement can be difficult. Having a comprehensive and up-to-date retirement strategy, with a knowledgeable team offering support, may help make the road ahead less strenuous.

At Lim Financial Group, we understand the many concerns individuals and families face as they prepare for retirement, whether that is five or fifteen years away. Our goal is to help clients feel confident about their future and pursue their vision of a comfortable retirement. Through our comprehensive approach, we develop customized retirement strategies that address clients' individual needs and goals, both short and long-term.

Retirement is a significant milestone in one's life. Our mission is to help make that transition more manageable and less stressful by building a personalized retirement strategy and offering ongoing support, unbiased advice, and objective guidance. Start preparing for tomorrow's retirement today by contacting us to learn more or to set up a commitment-free introductory meeting.

LEARN MORE



HELPING CLIENTS INVEST IN THEIR DREAMS

Without any conflicts of interest we put your needs first. When dealing with something as personal as your finances, it's important to work with an advisor you trust and with whom you want to work for the long-term. After all, building a financial plan is not a one-time event; it is an ongoing process that requires adjustments as your life or goals change. At Lim Financial Group, we want to fill this role in your life. We welcome the opportunity to guide you along your financial path. Contact us to take the first step.

[LEARN MORE](#)

Contact

Lim Financial Group

Office: (410) 415-5000

Fax: (667) 240-2131

9250 Rumsey Road

Suite 103

Columbia, MD 21045

alexlim@limfinancialgroup.com

stevenlim@limfinancialgroup.com



Quick Links

Retirement

Investment

Estate

Insurance

Tax

Money

Lifestyle

All Articles

All Videos

All Calculators

All Presentations

Check the background of your financial professional on FINRA's [BrokerCheck](#).

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation. Some of this material was developed and produced by FMG Suite to provide information on a topic that may be of interest. FMG Suite is not affiliated with the named representative, broker - dealer, state - or SEC - registered investment advisory firm. The opinions expressed and material provided are for general information, and should not be considered a solicitation for the purchase or sale of any security.

Copyright 2019 FMG Suite.

Securities offered through Founders Financial Securities, LLC. Member [FINRA/SIPC](#) and Registered Investment Advisor