MOFFATT FINANCIAL STRATEGIES

You work hard to build your wealth. Now create a plan to preserve it.

LET'S TALK

Protect Your Family - Steward Your Wealth - Leave a Legacy

Retire Happy - A Simple Guide to Your Next Big Adventure

If you're like 93% of Americans, you're looking forward to retirement. But are you really prepared for what lies ahead? Our free ebook can help you find out. Register today to receive your copy of "Retire Happy: A Simple Guide to Your Next Big Adventure."

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Plan for Your Family

Protect your family with a comprehensive strategy that will honor your decades of hard work and allow you to design a legacy you will be proud to leave.

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Plan for Your Business

Your business is a key component to your overall wealth picture. Preserve it with a strategy that focuses on this closely held asset you have endeavored your entire life to build.

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Your Wealth, Your Plan, Your Confidence

You are a successful professional. You have endured hardship and persevered through obstacles that most people can only imagine. The seconds, minutes, hours, days, and years you have dedicated to your business and career have accumulated into the lifestyle you are now accustomed. The lifestyle you and your family deserve. Honor the wealth you've worked so hard to build, with a plan that will work just as hard to preserve it.

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Welcome to Moffatt Financial Strategies

Moffatt Financial Strategies is fiercely committed to preserving and managing wealth for our esteemed clients. We define our role as advocates on behalf of individuals, families and businesses who require highly specialized financial and advisory services. With independence and integrity, the financial and tax planning strategies we provide are based on extensive market research, financial insight and comprehensive planning experience.

You already know what you want to accomplish. We will partner with you to design a plan that will help you pursue your goals.

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Our Process

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Our Story

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Our Committment

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Have a Question

Name

Email

Phone

Question

SEND

Contact

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Quick Links

Check the background of your financial professional on FINRA's BrokerCheck.

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