



Independent
Asset Advisory

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Uncommon Financial Opportunities

Important Questions That May Be Keeping You Up At Night...

1. Are my investments right for me? Do I understand them?
2. Can I afford to retire? How much can I spend in retirement?
3. Is my family really protected if something happens to me today?
4. Do I currently have the right investment strategy? How do I know?
5. What am I doing today for my child's education and is it enough?
6. What happens to my business and family if I can't work?
7. How do I make sure I don't outlive my money?
8. Am I paying too much in taxes? What can I do differently?
9. Is my will, trust and LLC up to date with current estate laws?
10. Should I leave my 401K at my company when I retire, or is that a huge mistake?

...Relax We Have The Answers

Providing Financial Wellness

Our goal is to help you have control over your day-to-day, month-to-month finances; so that you have the capacity to deal with life changing events; that you are on track to meet your financial goals and, as a result, have the freedom to make choices that allow you to better enjoy your life.