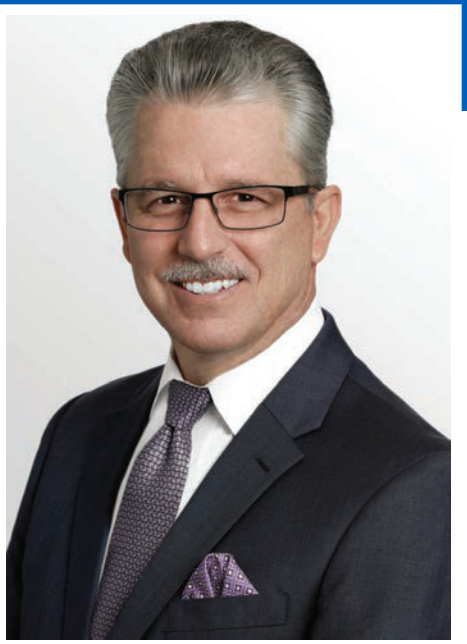
# CLARIFIED PLANNING™

Personalized Financial Evaluation & Guidance



We all imagine the kind of future we want to build—and we all face moments of uncertainty when it comes to making the right financial choices to get there. With the jungle of different choices and options out there, it is natural to feel overwhelmed and a little frightened when deciding your next step.

But you deserve more than uncertainty.

As your financial advisor, my role is to help you find clarity and make sense of your options to develop a plan that reflects what truly matters to you with confidence. Together, we will talk about the life you envision and turn those hopes into a thoughtful, actionable plan that evolves with you.

No plan can eliminate every unknown, but by taking intentional, informed steps today, we can create confidence for tomorrow.

You do not have to navigate your financial life alone. I will help ensure you feel supported, empowered, and ready to move toward the future you want with clarity and conviction.

**Ready to take the next step? Let's talk and start building your future with confidence.**

## Areas of focus include:

### Financial Position Analysis
- Cash reserve strategies
- Debt management
- Cash flow management
- Net worth analysis

### Investment Planning
- Asset allocation modeling
- Risk tolerance
- Education planning strategies
- Diversification strategies

### Preservation Planning
- Life insurance planning
- Disability income insurance
- Long-term care insurance
- Business succession planning

### Tax Planning Strategies
- Business ownership
- Non-qualified investment planning
- Tax reduction strategies
- Tax deferral methods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- The American College of Financial Services®
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  - Retirement Income Certified Professional® (RICP®) Designee
- National Association of Plan Administrators (NAPA)
  - Certified Plan Fiduciary Advisor® (CPFA®) Designee
- Wharton School of Business at the University of Pennsylvania
  - Retirement Planning Program
- Kaplan University
  - Financial Planning Certificate
- Series 6, 7, 24, 63, and 65 Securities Registrations
- Life and Variable Life Insurance licensed in multiple states
- Bachelor of Science, Computer Information Systems
- Veteran, Military Intelligence Segment of the U.S. Army® Reserves


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