

AO

WEALTH
ADVISORY

The Value of Financial Planning

REACHING GOALS THROUGHOUT LIFE



Urbandale, Iowa

515-224-7849



The Value of Financial Planning

A CFP® professional can help you set your goals, provide a roadmap to reach them, and be your guide to the special tools and strategies that can help you get there.

ACHIEVE YOUR FINANCIAL GOALS



You can stretch your money when you work with a professional who is trained to show you how to choose investments. CFP® professionals have the education, experience, and access to research and insights that the average investor does not. They know how important it is to keep up with the latest laws and tax code changes, and they know about strategies that can make it easier to reach your goals—which may save you a lot of money over the long run, too.

FINANCIAL PLANNING FOR ALL STAGES OF LIFE

Financial planning can help when you are just getting started in your career and trying to pay your bills, get out of debt and save for the future. And your financial plan can grow with you as you get older and your financial life becomes more complicated. A CFP® professional can help you set your financial priorities when you have competing needs for limited money—such as juggling saving for your kids' education costs and saving for your own retirement. And if you end up in a position where you can cover all of your needs, a financial plan can help you build and protect your estate for your loved ones or leave a lasting legacy for a charity.

Planning can also help protect your family from the unexpected. With the help of a CFP® professional, you can create a financial plan that helps you worry less about market downturns, emergency expenses, health-care and long-term care costs, or outliving your retirement income. No matter what stage you are in life, financial planning can help you reach your goals and help provide financial security for you and your family.

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