

I am proud to announce that I am now a CERTIFIED FINANCIAL PLANNER™. This designation is a culmination of my experience, rigorous advanced coursework, and passing an extensive exam. As a financial professional, the CFP® validates my comprehensive approach to financial planning, the importance of further education, and my belief that I act as a fiduciary by putting your needs first.

With the country's economy continuing to strengthen, personal financial security is still uppermost in many peoples' minds. They are eager for advice about their retirement, estate plans, insurance, emergency funds, liabilities, and their asset allocation. Today's financial conditions require a holistic approach - looking at an individual's entire financial picture, not just one aspect. Working with a CERTIFIED FINANCIAL PLANNER™ professional is assurance that he or she is a credentialed expert who does just that, and is held to high ethical and professional standards.

Please feel free to contact me to review your Financial Plan.

Kind regards,
Meghan



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