LORI CRILLEY
CRC®, RFC®, CPFA®

FINANCIAL ADVISOR

"As a Certified Retirement Counselor® and a Certified Plan Fiduciary Advisor®, I take seriously my responsibility to help my clients navigate today's complex retirement plans and options. Helping them to identify the appropriate retirement saving and income strategies **to meet their goals and making a difference in their lives.**"

- Lori Crilley

OUR APPROACH

- Regular One-On-One Meetings
- Investment Portfolio Design
- Medicare Needs Analysis
- Invites to Seminars & Events
- Online Account Access
- Education Workshops
- Work With Your CPA
- Work With Your Estate Attorney
- Work With Business Designing 401k and Retirment Plans

CONTACT

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Life Changing FINANCIAL SERVICE

SPECIALIZED SERVICES

REGULAR ONE-ON-ONE MEETINGS

We meet twice a year to catch up, review your plan, and make adjustments based on your goals.

SEMINARS, EVENTS & WORKSHOPS

Communication is very important to us and that includes providing quality information & education to our clients.

FINANCIAL GOALS PLANNING

Develop a strategy designed to help you accumulate assets to meet your retirement and other financial goals in a tax-efficient manner.

BUSINESS PLANNING

Business owners have unique needs. As a CPFA, we provide specialized services to help with retirement plan development and referrals to maximize opportunities.

TAX MINIMIZATION STRATEGIES

We seek investments with tax minimization as a significant focus of your financial planning. We work with your CPA

INVESTMENT DESIGN & MONITORING

We work with Industry leading analysts and sofwtare to track shifts in the market, and with you to track changes in your life & assets.

NOW ACCEPTING REFERRALS