It's amazing that many people will spend several thousand dollars on vacation, but won't spend half that much on planning for the longest vacation of their lives–-retirement.

For those with at least $1 million in investment assets, we provide guidance and assistance by preparing a written, personalized financial plan in an effort to help you achieve ***Financial Freedom*** and peace of mind. This plan will serve as your blueprint for building your financial house, or as a roadmap for your financial journey ahead. It will include, where needed and applicable, the following pillars of sound financial planning:

- Cash flow funding, including Social Security implementation, and planning for specific goals such as retirement income needs, travel and vacation, charitable giving, education needs, and more.
- Risk Management review and discussion of all insurances including auto, home, liability (umbrella), health, disability, life, long-term care, Medicare, and more.
- Estate planning review including a detailed checklist.
- Tax Planning and advice in strategic tax reduction investment strategies where applicable.

There is no better way to help you and your loved ones ***"sleep well at night"*** than to outline and implement a well-designed financial plan.

The number one reason why most people fail financially is because they simply fail to plan.

Unbiased Financial Planning Advice

Planning with ISI Financial Group starts with conversations about where you are today and where you hope to be in the future. With that information, we devise a written plan and strategies to help you navigate the complexity of your financial life--improving your cash flow, getting prepared for retirement, optimizing your investments, minimizing your taxes, properly managing your financial risk through insurance, and developing an estate plan, if needed.

Each of our clients share one common purpose: They decided to seek out a trustworthy financial fiduciary and coach with significant experience and expertise, to provide guidance to them in the most important aspects of their financial life and future. We ask questions that they didn't think of and establish scenarios for them to gain a better understanding of the "What If's" so that they can confidently plan for a secure financial future.

A Trusted Process

Because we are Fee-Only financial planners and fiduciaries, you can be confident that the advice you receive is unbiased and delivered with your best interests in mind at all times.