



Skilled advice from the moment you walk in the door.

Work with a REGISTERED PARAPLANNERSM designee, someone much more skilled at handling planning issues than the typical sales assistant. He or she is a member of a financial planning team who is able to assist with your basic financial planning needs. Graduates of the REGISTERED PARAPLANNERSM program have gained practical knowledge in areas such as:

- The Financial Planning Process
- Personal Financial Statements
- Time Value of Money
- Tax Planning
- Retirement Planning
- Estate Planning

Call today for financial recommendations.

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