

Straight Talk from a Financial Planner About Financial Planning

I'm a fee-only financial planner. Unlike some financial planners, I don't take commissions, sell products or require that you have a certain amount of money to invest. I work with people who want to have a secure future, put their children through college or avoid making investment mistakes. The benefit to you of my approach is that you can be confident that I'm acting in your best interests.

Clients pay by the hour and as we go along, just like an accountant, attorney or nature guide. You can hire me for a few hours or for many hours and I always start an assignment with a specific client agreement that describes what we will accomplish and what it will cost you.

The people I work with have three common characteristics:

- 1 They are clear about their goals.
- 2 They are willing to take responsibility for their financial decisions.
- 3 When it comes to taking actions, they are ready and willing to do it themselves.

As to my background, I have worked in the employee benefits arena for more than 25 years for several large consulting firms and I have been a financial planner for four years. I'm also an Adjunct Professor at City University where I teach financial planning courses to people who are studying to become financial planners. I hold the designation of Registered Financial Planner (RFP) and my company is a Registered Investment Advisor in the State of Washington.

If my approach to financial planning fits what you're looking for, let's talk.

My mission is helping people make sound financial decisions one hour at a time.

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