

Providing the Essentials for Your Financial Peace of Mind

At Eclectic Associates, we offer the essentials of financial planning and we don't make promises that we can't back up. Instead, we provide experienced advice and a comprehensive plan to help give you clarity and the freedom to enjoy the rest of your life.

How We Help

- **We are fee-only.** We don't accept commissions and we don't sell products. We get paid only by you.
- **We are fiduciaries.** We give advice that is only in your best interest.
- **We have expertise.** Our credentials include the CFP® and CFA designations, as well as the MBA degree.
- **We have a large team.** Our large team of financial planners can help you feel confident that we will always be there for you.
- **We are independent.** We are not beholden to anyone's interests but yours.
- **We are experienced.** We have been in the business of financial planning since 1984.

Who We Help

- **Pre-retirees** who realize that retirement is finally "real" and it's **time to get serious about the future.**
- **Retirees** who want to make sure that they are **not going to outlive their money.**
- **Investors** who are **anxious about their portfolio** and are unsure if their current advisor is really helping them.
- **Business owners** who want to **protect their livelihood and their family** from the risk and volatility of their company.
- **Professionals** who are **changing jobs** and have to determine what to do with their prior company's 401(k) plan.
- **Widows and widowers** who are facing **major changes** in their financial situation.
- **People who have received a windfall**, such as an inheritance or property sale, and **want help optimizing it.**

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Our Services

- Financial planning
- Retirement planning
- Investment management
- Cash flow analysis
- Insurance evaluation, including life and long-term care
- Tax strategies
- Company retirement plans
- Debt management
- Social Security optimization
- Education funding
- Health insurance guidelines
- Medicare evaluation
- Estate planning
- Charitable giving

Schedule a 15-Minute Call

Let's see how we can help you achieve peace of mind about your money and your future. Schedule your complimentary call today: www.eclecticassociates.com.



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