Financial Planning

At Investment Management & Trust, we believe ongoing financial life planning to be fundamental to achieving your goals and enhancing your quality of life. We also believe ongoing and proactive implementation – delivered through advice that is personal, comprehensive, objective, competent and ethical – to be indispensable to caring for all aspects of your wealth. We have designed our financial planning services to reflect these beliefs.

To create your personal Financial Plan, you will begin by meeting with a CERTIFIED FINANCIAL PLANNER™ to discuss the appropriate components of six main areas of planning:

- Budgeting and Savings
- Education Planning
- Estate Planning
- Insurance
- Investment Allocation
- Retirement Planning

We listen closely to ensure that we understand your personal and financial aspirations, time frame, and risk tolerance. Then we meet with you to review a written analysis of your unique needs and recommend an action plan based on the priorities you have identified.

Financial Planning can be accomplished over a period of time, easily accommodating your schedule and decision-making pace. Our holistic approach to planning examines your entire financial life, as well as, the interdependency among its individual parts. You'll feel confident that all the necessary pieces are in place and organized, relieving you of many financial concerns.

Investment Management & Trust Financial Planning experts acknowledge that your personal wealth consists of more than your financial assets. We build our plans and recommendations around your values and lifestyle to ensure life success for you and your family. Our goal is to help you optimize and manage your total wealth.

We offer customized detailed financial analysis to meet your needs. Three plans are available.

Basic Plan
Examines your current financial situation.

Full Plan
Expands upon the current financial picture to ensure future goals are being met.

Comprehensive Plan
Builds upon the Full Plan with an emphasis on estate planning.

For more information on Financial Planning, contact:

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