FFP WEALTH MANAGEMENT

Find Your Brighter Future

About Us

If you're ready to take the next step towards a brighter future, please contact us at one of our offices to set up a no-obligation review of your financial portfolio. We are committed to helping you develop a strategy that aligns with your retirement goals.

Have Questions About Your Financial Future?

We Can Help You Find Answers.

- When Can I afford to retire?
- What do I want my retirement to look like?
- What kind of legacy will I leave behind?
- What is the purpose behind my money?
- Am I taking on too much risk?

We are a comprehensive wealth management firm serving business and individual investors. We offer our clients advice from a comprehensive financial perspective, the benefit of total objectivity, and unparalleled service.

Why You Should Be Working With Us

Many people recognize the value in having a plan to achieve their future goals. However, we found that prior to working with us, many of our clients failed to realize the importance of regularly reviewing their strategies and optimizing their investments. Today's market environment is marked by volatility and uncertainty, and no single strategy will yield success. Our disciplined approach prioritizes careful risk management and flexibility, which allows us to help our clients pursue their financial goals in ever-changing conditions.

Here's Why Our Clients Choose Us

We believe that putting our clients first allows us the freedom to be objective. As an independent wealth management firm, we are able to develop completely personalized strategies that are not tied to any one company's products.

We Are Independent

We believe that putting our clients first allows us the freedom to be objective. As an independent wealth management firm, we can develop completely personalized strategies, enabling us to provide our clients with a range of financial products that best fit their needs.

We Are A Team

When you join our family, you don't just get one advisor; you immediately gain access to 100 years of combined industry experience. Each of our experts brings a unique set of skills, experience, and perspective, and we believe that our team-based approach provides the best outcomes for our clients. We also have deep relationships with a network of accounting, tax, estate, and insurance specialists that we draw on to help ensure our clients' needs are addressed. Regardless of your financial needs, you can rely on us to find the expertise you need and quarterback the process so that the advice you receive is integrated, holistic, and comprehensive.

We Offer First-Class Service

We believe that our biggest differentiator is our wholehearted dedication to service. We are there for our clients and take personal pride in anticipating their needs and offering responsive, caring service. We want our clients to be able to spend time doing the things they love, knowing that an experienced team is working for them.

The Wealth Maximizer

Our Wealth Maximizer is a four-phase process designed to thoroughly understand your personal financial situation and maximize the value of our professional advice to you.

By taking the time to truly understand your hopes, dreams, and goals, we can develop personalized financial strategies to help you achieve your life aspirations.

1 The Discovery Process

- The Discovery Meeting
- The Independent Advantage
- My Advisor Must

2 The Game Plan

- The Collaborative Team Approach
- Our Approach to Investing
- The Bucket System

3 The Solutions Kickoff

- The Service Solutions Experience
- The 45 Day Review
- The FFP Wealth Management System

4 The Brighter Future

- The Relationship Expander
- The Three Indexes

How to Work With Us

If you're ready to take the next step towards a brighter future, please contact us at one of our offices to set up a no-obligation review of your current circumstances and strategies. We value the trust and confidence you place in us and want to assist you in reaching your goals.

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Our Services

Families

- Retirement Planning
- Professional Money Management
- Investment Planning
- Individual Insurance (*Life, Disability & Long Term Care*)
- Education Planning
- IRA / 401k Rollovers
- Estate Tax Planning

Business

- Employee Benefits Design (*Group Health, Disability, & Life*)
- Business Insurance Analysis
- Retirement Plans
- Business Succession Plan
- Executive Deferred Compensation Plans

Visit our website: www.FFPInc.com