Renaissance Financial

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Using creative business and personal planning, we help our clients achieve financial freedom... one relationship at a time.

Who we are

At Renaissance Financial, we blend creativity, team collaboration, and decades of experience to design solutions that help protect, grow, and preserve what matters most to you. Through personalized strategies and meaningful relationships, we provide wealth management, estate planning, and tax-efficient solutions tailored to your evolving goals. Our commitment is to deliver an unmatched experience, helping you achieve financial freedom—one relationship at a time.

How we help

Individual + Family

Financial Planning

- Investment Planning
  - Mutual Funds, Stocks, Bonds
  - Fee-Based Portfolio Management
  - College Funding
  - Cash Management
- Insurance Planning
  - Life Insurance
  - Disability Insurance
  - Long-Term Care Insurance
- Retirement Planning
  - Social Security, Pension Plan, 401(k) or 403(b), IRAs, Roth IRAs
  - Personal Savings, Investments, Annuities, Life Insurance
- Advanced Strategy Planning
  - Estate Planning Strategies
  - Charitable Giving Strategies
  - Tax Reduction Strategies
  - *Fee-based Financial Planning

Business

- Key Person Insurance
- Buy/Sell Funding and Strategies
- Succession Solutions
- Retirement Plan Strategies
- IRAs, Simple IRAs, Roth IRAs, SEPs, KEOGHs, & 401(k)s
- Executive Compensation Programs
  - Executive Bonus Arrangements
  - Deferred Compensation
  - Defined Benefit Plans
  - Cash Balance Plans
  - Profit Sharing
- Financial Education Seminars
- Group Benefits: Life, Health, & Disability Insurance

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www.rfc.com

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