SHORE
FINANCIAL PLANNING
Financial clarity and peace of mind.

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SHORE FINANCIAL PLANNING, LLC

Shore Financial Planning, LLC offers comprehensive, fee-only financial advice. As members of the Alliance of Comprehensive Planners, the community of tax-focused financial planners that operate under the retainer model, you can be assured that our financial planning method has been tried, tested, and refined for over 20 years. Our system of planning addresses the real-life needs of people just like you.

When you work with **Shore Financial Planning, LLC**, you can expect:

No Product Sales

We don't sell any financial products nor do we receive any commissions. We are fiduciaries. Our complete focus is on what is best for you.

All-inclusive Approach

Together we design an all-encompassing strategy that takes into account every aspect of your finances.

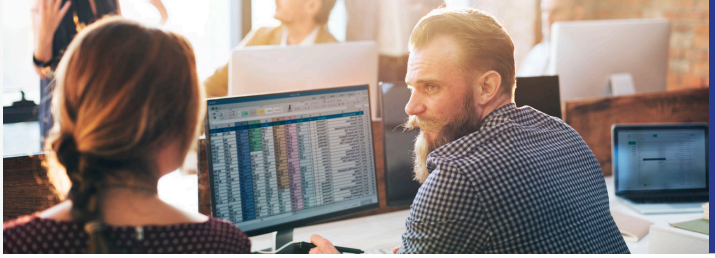
Unlimited Access

With your annual fee, you can meet or speak to us as often as is necessary to help you make important decisions and accomplish your financial goals.

Value for Your Money

We are committed to providing value that exceeds our fee.

OUR SERVICES



Goal Setting

Understanding what is important to you is essential when structuring your finances. We work through exercises with you to identify and create plans to achieve your goals.

Coordinated Investment Advice

We will provide you with the objective, unbiased investment recommendations that are based on your personal needs so that you can make the best investment decisions.

Skillful Tax Planning

Taxes are at the core of financial planning. We review all potential tax consequences that can impact your financial security throughout the year.

Worry-free Retirement Planning

Retirement is about money; but it's more about personal fulfillment and enjoyment. We will help you create a plan to make the most of your retirement years.

Risk Management – Are You Over/ Under Insured

Insurance. There are multiple options for any type of situation and the task of deciding what to choose can be daunting. We will discuss these issues in detail and help you spend your insurance dollars wisely.

Lifestyle Spending Review

We'll help you understand the difference between good and bad debt, make sure you have enough set aside for emergencies and special opportunities, and, if needed, help you gain control over your spending.

Proactive Estate Planning

Estate planning goes well beyond making a will. We will evaluate with you the pertinent estate issues that impact your life and consider choices that you can then implement with your attorney.

Open-Door Policy

Financial planning is a process, not an event and we are here for you when you need us. Our open-retainer approach accommodates regular ongoing reviews of key financial areas, with access, or an open-door, to the advisor when needed.

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