milestones FINANCIAL

Milestones Financial, LLC

Milestones Financial offers fee-only, “advice-only” financial planning services, including investment recommendations, for people age 50+ who want to enjoy retirement on their terms.

As tax-focused financial planners, our system of planning addresses the real-life needs of people just like you.

When you work with Milestones Financial, you can expect:

Straight Talk

Our complete focus is on what is best for you, at all times. We do not accept commissions, referral fees, or compensation of any kind based on selling financial products. We are fiduciaries.

Value for Your Money

We are committed to providing value that exceeds our fixed fee.

All-inclusive Approach

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

Unlimited Access

With your fixed fee, you can meet or speak to us as often as is necessary to help you make important decisions and feel secure about your money.

Our Services

Worry-free Retirement Planning

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

Coordinated Investment Advice

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

Risk Management – Are You Over/Under Insured

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

Skillful Tax Planning

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

Proactive Estate Planning

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

Lifestyle Spending Review

We will help you make sure you have enough set aside for emergencies and special opportunities, and, if needed, how to arrange your money to have cash flow and savings organized automatically.

Goal Setting

Understanding what is important to you is essential when structuring your finances. Together, we work through exercises to identify and create plans to achieve your goals and objectives.

Open-Door Policy

Financial planning is a process and not a one-time event, and we are here for you when you need us. Our open-door approach accommodates regular reviews of key financial areas whenever they are needed.

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