



milestones
FINANCIAL

Milestones Financial, LLC

Milestones Financial offers fee-only, hourly 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, always. We do not accept commissions, referral fees, or compensation of any kind based on our recommendations to you. We are fiduciaries.

Value for Your Money

We are committed to providing value that exceeds our fee.

All-inclusive Approach

Together, we can design an all-encompassing strategy that considers every aspect of your finances.

Timely Access

We are available for future consultations as needed to address your changing circumstances and ensure your plans remain aligned with your evolving needs.

Our Services



Worry-free Retirement Planning

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

Coordinated Investment Advice

We can provide you with objective 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 can discuss these issues and help you spend your insurance dollars wisely.

Skillful Tax Planning

Taxes are at the core of financial planning. We can 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 can evaluate the pertinent estate issues that impact your life and consider choices that you can then implement with your attorney.

Lifestyle Spending Review

We can 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 can work through exercises to identify and create plans to achieve your goals and objectives.

Available When You Need Us

Financial planning is a process and not a one-time event, and we are committed to providing the support you need. Schedule regular reviews or contact us with questions whenever they arise.



Disclosure

Milestones Financial, LLC (“Milestones Financial” and “its”) is a registered investment advisor offering advisory services in the State of Ohio and in other jurisdictions where exempted. Registration does not imply a certain level of skill or training.

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