DAVENPORT 1863
BUILDING WEALTH TOGETHER

Helping you navigate through life transitions and important life events.

Regardless of your age or income level, a personalized financial plan can help you meet your goals, stay on track, and prepare for retirement. At each stage of life, you may have your own set of questions.

20s & 30s

How do I pay off student loans while saving for other goals?

How much should I be contributing to my 401k?

What size mortgage can I afford?

What kinds of future expenses should I plan for?

How do I enjoy experiences today and prepare for the future?

40s & 50s

Am I on track to retire?

How can I reduce my taxes?

What is the best way to save for college for my children and have I saved enough?

Do I have enough life insurance to protect my family?

Can I afford a second home or take an expensive vacation?

60s & Beyond

Am I financially ready to retire?

How am I going to pay for health care?

When should I start taking Social Security and Medicare benefits?

I'm retired now, am I going to be okay?

What should I consider when gifting to family or a charity?

Contact me today for help preparing for tomorrow with a personalized financial plan.

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