AVISEN
WEALTH MANAGEMENT

FINANCIAL PLANNING FOR FAMILIES

When your professional life takes off and you are balancing family care and finances, you need stability and sound advice. Growing families don't always have the time or attention it takes to properly oversee finances and investments. We cater to all parties in your household and bring transparency with customized family-centric solutions. We stay disciplined to what is always best for you and your family's goals.

- Guiding you through life circumstances that can have an impact on you, your lifestyle, or future retirement needs.
- Anticipating expenses you could expect and setting a savings plan for things like 529s, lifestyle adjustments, insurance planning, etc.
- Getting kids through college and making good decisions along the way.
- Structuring your estate to protect you and your loved ones.
- Having open conversations with key parties in your family.
- Determining if you want to be philanthropic through trust, estate, or legacy planning.

MULTI-GENERATIONAL FAMILY PLANNING

Families have lineage. The financial and life decisions you make today can have an impact on future generations and your long-term stability. Working with mature families, we help you manage personal and family finances, while putting a date to retirement and other important goals. We help you act as a sounding board and counselor for other family members who have money questions, helping them stay on track. We provide a low-key approach for children and grandchildren to get to know us to help guide their personal decision making.

We help you preserve your wealth and legacy beyond financial planning. We do so through life planning. We work with the key advisors in your life, so you don't always have to be the intermediary.

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