

STEVEN YOUNG FINANCIAL PLANNING

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A Different Kind of Financial Planner

The Difference

I work for you, not a brokerage company or sales organization.
I charge a simple hourly rate, no commissions, no AUM fees, and no hidden charges.
No minimum account size, no long-term contract
As a Registered Investment Advisor, I work in a Fiduciary capacity with all clients

Who I Am

An advisor you will feel good about. I started this business to fill a need. When I was seeking financial advice all I found were salesmen, calling themselves financial planners or financial advisors. I offer a new choice; the delivery of customized advice unswayed by commissions or the investment product of the day. I'm independent, well schooled and passionate

Philosophy

Protecting you from Wall Street. Most products pushed by sales organizations are designed to make money for the sales company, but do little to help most Americans achieve financial success. It's more important to avoid catastrophic losses, than it is to make a killing in the markets. This is accomplished by using low cost products designed to capture the markets return, not trying to beat the market.

Affiliations

CFP® board of standards
National Association of Personal Financial Advisors
Financial Planning Association
The Garrett Planning Network, Inc
The Springfield Area Chamber of Commerce

What I Do

I build peace of mind, confidence and brighter futures. I help clients define their financial goals and develop strategies for reaching those goals. Whether building assets for the future or seeking to preserve, protect and enjoy the wealth already accumulated, I provide clients with an independent, unbiased alternative to commissioned planners and product salespersons.

Services

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|---------------------------------|--------------------------------|
| Personalized Financial Planning | Cash Flow Spending Plan |
| Retirement Planning | College Funding Advice |
| Investment Planning | Insurance Planning |
| Tax Planning | Estate Planning |
| Second Opinions | Financial Seminars & Education |