Introducing our SECOND OPINION SERVICE

In my 30 year career, I have never seen so many people going through a transition in their financial life and wanting someone to “check under the hood” to make sure they are on the right track. People are very unsure of what to do during times of transition.

To help you make informed financial decisions, we offer a free second opinion service. We’ll take you through a detailed discovery and analysis process to help you get very clear on where you are now and where you’d like to go. We’ll examine any of the gaps in your current plan that may need to be filled. Early in my career, a wise mentor of mine told me, “it never hurts to know more about your current situation.”

ONE OF THREE THINGS WILL HAPPEN:

1. We find that you are in good shape and advise you to stay where you are, OR

2. We find out that you could better your situation. If we are not a fit for your particular situation, we’ll be happy to point you in the right direction to a financial advisor who can work with you more effectively, OR

3. We find gaps in your current plan and feel we could provide a significant advantage in helping you reach your goals. We would then explore the idea of working together with you.

To learn more and take advantage of our Second Opinion Service, call our office at 919-463-0018.

KEYSTONE FINANCIAL PARTNERS

Contact:

Jim Trull, AIF®, CFP®
Wealth Manager
919-463-0018
jtrull@keystonefinancialpartners.com

1255 Crescent Green, Suite 440 | Cary, NC 27518 | www.keystonefinancialpartners.com