Each employee's financial situation is unique. Accordingly, each individual should have a plan that is customized to align their money (including their 401(K) plan) with their life. Align provides personal access to our Certified Financial Planners who consult with plan participant - on an individual as-needed basis - at no additional cost. This service is confidential for participants and delivered in an environment of privacy and trust.

For more information about the services we provide to individuals, please visit www.alignmywealth.com.

On-Staff Expertise

Participants sit down with an experienced and credentialed member of our team who conducts an extensive review of their financial profile with custom analysis on a range of financial needs including:

- Retirement Assets
- Non-Retirement Assets
- Investment Selection
- Asset Protection

- 529 College Planning
- IRA Rollovers
- Investment Diversification
- Term Life Insurance

You benefit from the wisdom we've gained in our pursuit of wealth management excellence since 1993. You'll experience service beyond the numbers—such as custom portfolio design, portfolio transitions, individualized reporting, and a consultative client relationship.

Client Focused. Period.

Our Process