Harmony Financial Strategies

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With decades of experience in the financial services industry and specialized training in estate and retirement planning specifically for LGBT domestic partners, we are well-positioned to help with strategies that seek growth and plan for preservation of your wealth. As members and allies of the LGBT community we understand the issues you face, and welcome the opportunity to develop an individualized strategy to help you pursue your short-term and long-term financial goals.Our advisors are CERTIFIED FINANCIAL PLANNER™ (CFP®) practitioners, CERTIFIED INVESTMENT MANAGEMENT ANALYSTS (CIMA®) and ACCREDITED DOMESTIC PARTNERSHIP ADVISORS (ADAP®) committed to practicing with the highest degree of ethics and honesty.As ACCREDITED DOMESTIC PARTNERSHIP ADVISORS we are well-equipped to work with domestic partners and LGBT clients. We are aware of the challenges, laws and regulations that impact retirement and estate planning, wealth transfer, and taxation, so you can be confident that your needs will be understood and thoughtfully explored.As an independent firm, we have no proprietary products to sell or sales quotas to meet. This means you are free to select from a broad array of investment products, not a narrow selection from a single firm. Our access to the latest technology and extensive independent research enables us to offer you conflict-free investment recommendations.The caring advisors at Harmony Financial Strategies provide unbiased financial planning and investment advice based on a thorough understanding of your life and circumstances. We apply a holistic, innovative approach to investing, emphasizing socially responsible long-term investments. Our investment selections are based on realistic expectations for portfolio return and proactive risk management.

Website
Email