



WEALTH PLANNING BLOG

Ring in the New Year with Wealth Planning

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Happy New Year everyone and welcome to our FIRST Wealth Planning Blog post! How did you ring in the new year? Did you set any goals for yourself for 2014? We had our first meeting of 2014 last week to discuss the WP team goals for this year, and at the top of our list was this blog.

Have you ever talked about, and *talked about*, and *talked. a. bout.* something you really want to do, and no matter how many deadlines you give yourself *something* always seems to get in the way? Well for us, that is this blog. We could probably blog about the blogs we have talked about blogging about at this point.

Our team is super energetic and passionate about sharing our knowledge regarding the importance of wealth planning, and any time we have new ideas for our clients we hit the ground running. One of our most important mottoes is that we refuse to let our clients fail themselves. In other words, we don't let them keep talking about wealth planning and how badly they need to get it done; we just get.it.done. (for them).

So, we decided it's time to live our motto, and start this blog already! Because our experience levels run from 30+ years all the way down to the single digits and our clients span the nation and all tax brackets, we have so many stories, lessons and informative pieces we can't wait to share with you. Look for our new blogs on the 15th and 30th of every month to learn the ins and outs of wealth planning, and stay tuned throughout the month for extra "mini-posts" that we just can't wait to get out! For some of you, just think payday!, and then look to us for helpful information on planning for what you're working so hard to earn.

Keep working on those New Year's goals, and we will see you back here on the 30th!