

Choosing Positive Changes Makes You Great!

Helping you Benefit from your Control of Meaningful Purpose of Life and the Most Enjoyable and Free Lifestyle

Your Financial Team

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Valued Client
YOU

Your Financial Partner

Wen-Liang Huang , Ph.D., CFP®, AEP®, EA
Comprehensive Financial Planning

Cash Flow Planning
Incomes & Expenses ; Asset; Debt

Tax Planning
File & Saving Taxes

Investment Planning
Wealth Accumulation

Retirement Planning
Income & Capital Appreciation

Insurance Planning
Risk Management

Estate Planning
Will & Trust ; Saving Taxes

My Value Promise as your Delegated Financial Partner: What do you get? How much does it cost?

- Based on your Financial Road Map®, all of your financial advice will be aligning with your most important goals and your deepest held values.
- Also, you will get your financial house in perfect order and keep that way forever.
- You will have ten full-level of confidence that no matter what changes of your circumstances, politics, market or the economy of the world happen. You will still achieve your most important goals and your deepest held values.