Special Needs Planning

Caring for an individual with special needs takes special planning. All too often we put off the task of planning as it can be overwhelming.

Let us use our extensive experience and knowledge to help you secure your financial well-being and help you implement your plan. There are many components to Special Needs Planning, including Financial Planning, Guardianship, Trusts and a Letter of Intent. We'll be your advocate in this process.

Contact Us

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Consolidated Planning Group
Managing Wealth and Protecting Tomorrow

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Protect your loved ones with a reliable plan.

Financial Planning

Special Needs Planning

Insurance

Our Firm

Consolidated Planning Group, Inc. is a privately owned insurance and financial service firm. We proudly serve the needs of our customers across the U.S. through a holistic approach to planning. Our firm delivers real strategies to the most complex situations faced by professionals, business owners, and families. We are proud to provide a broad range of services specifically designed to help you meet your goals.

At Consolidated Planning Group, Inc., we care about your unique needs and goals. We believe a personalized financial plan will help you achieve success.

Services

We can help you execute a sound financial program utilizing the following products and services:

Financial Planning:

- *Wealth Management*
- *Investments*
- *Legacy Planning*
- *Retirement Planning Strategies*

Special Needs Planning:

- *Advocacy*
- *Transition Planning*
- *Lifetime Care*
- *ABLE Accounts*

Insurance:

- *Life and Disability Income Insurance*
- *Individual Health Insurance*
- *Long-Term Care Insurance*
- *Annuities*

Qualifications

With more than 25 years in practice, our experience, strategies and recommendations will help you make the right decisions about your financial future.

Each of our representatives have extensive personal and professional experience. Many hold various professional designations and qualified representatives are licensed to sell a variety of investment and insurance products.

One of the benefits of working with us is our ability to provide clear, easily understood explanations of financial products and services.

The personalized program that we can provide is a roadmap to working toward a more secure financial future. We're looking forward to using our experience to help you pursue your financial goals.