LARSON
WEALTH MANAGEMENT

David Larson, CFP®, Wealth Advisor

Our commitment to you

We are dedicated to helping you pursue your investment and financial planning goals by providing personal attention and quality service.

How we help you make informed and objective decisions

We provide comprehensive portfolio construction based on your specific needs, time horizon, & risk tolerance, which we determine after a series of thoughtful discussions.

Identify and prioritize objectives	**Gather information about your situation**	**Analyze and evaluate your situation**	**Propose recommendations**	**Take action**	**Track ongoing progress**	**Make changes as needed**

Pursue your goals | Maintain confidence

Our services

We offer a range of planning resources and services to help you pursue your goals:

- Comprehensive wealth management
- Financial planning
- Tax planning
- Social Security planning
- Estate planning
- Social Security strategies
- Small business retirement plan services
- Business succession planning

How we communicate with you

We believe that regular ongoing client review meeting are a key component in the financial planning process. Once we establish a relationship, together we determine the frequency of meetings and determine our goals for each meeting.

Our fee structure

Our investment advisory practice is fee-based. Annual advisory fees are transparent, assessed quarterly, and calculated simply as a percentage of assets under management. Commission-based products, while not preferred, are available in limited circumstances.

Disclosures

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