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Company Backgrounder

Life Certain Wealth Strategies provides unbiased, individually tailored, financial planning advice to meet the needs of every client it serves. Unlike the financial planning advice available through a financial institution that recommends its own products and services, Life Certain Wealth Strategies is an independent firm that provides comprehensive and objective advice to its clients.

Life Certain Wealth Strategies was founded in January 2003 by two financial planners, Herb White and Randy Stone, who left their jobs at a large bank because they believed they could better serve the needs of clients as independent, unbiased advisors.

While some financial planning firms assign each client to a single advisor, Life Certain Wealth Strategies takes a different approach. A complete team of advisors combine their expertise in individual fields to provide personalized solutions that meet their clients' specific needs.

Today the company has grown to 7 advisors and 5 support personnel with a wide range of expertise and knowledge to serve retirees and people nearing retirement with in-depth financial and wealth-management advice.

The company is led by Herb White, a Certified Financial Planner™ with a BA and an MBA in economics. Mr. White is also a Chartered Financial Consultant (ChFC) and a Chartered Life Underwriter (CLU).

Services

Using a team of in-house experts, Life Certain Wealth Strategies offers personalized services in the following areas:

- Retirement Planning
- Investment Planning
- Estate Planning
- Stock Option Exercise Planning
- Collaborative Divorce Planning
- Insurance Planning
- Portfolio Review
- Employer Sponsored Plan Review
- College Savings

Clients

Life Certain Wealth Strategies focuses on meeting the needs of retirees and Baby Boomers nearing retirement age. Most clients are middle class individuals or business owners seeking to take care of their family and protect their financial independence and standard of living into their retirement years.

Location

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