CG Financial Services

Unlock Your Financial Potential with Adaptive Planning for Individuals and Businesses

Our life planning process goes beyond traditional financial planning to organize your financial life and build an adaptive plan to help achieve your changing goals.

For Individuals

Invest for the Future

Turn your current financial means into a more secure financial future for yourself and generations to come.

Plan for Retirement

Gain the confidence of knowing you can maintain your current lifestyle or pursue new interests even when you're no longer working.

Ensure Your Legacy

You've worked hard to build something worth leaving to your loved ones; preserve it with strategies tailored to you.

Minimize Tax Impact

Keep more of your hard-earned money with active strategies designed to uncover tax-saving opportunities.

Protect Your Assets

Make sure what you've worked so hard to earn is protected with the right amount of insurance coverage.

For Businesses

Align Business and Personal Goals

Our holistic approach marries business and personal financial management to ensure your ongoing financial security.

Reduce Taxes and Increase Cash Flow

By acting as your personal CFO and business guide, we help you implement the right strategies for improving your business's value.

Attract and Retain Key Employees

We offer retirement, executive benefit, and employee health and welfare plans to help you engage and keep quality, long-term employees.

Design and Service Retirement Plans

Turn to our experts to design, implement, and maintain a retirement plan customized to the goals and objectives of your business.

Protect Your Business

Reduce your business's risks and vulnerabilities with comprehensive insurance coverage designed to protect you, your employees and your company.

We strive to...

- Align your goals with a customized plan
- Guide you through life's changes
- Simplified solutions with a holistic approach
- Helping people achieve lifelong goals
- Have real conversation without the financial jargon
- Understand your past, present, and future experiences with money

Talk with an Advisor

We're ready to guide you through life's changes.

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