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**P**opa Financial Services, Inc. is a firm dedicated to providing the unbiased advice and services that you need to save money and secure your financial future.



Our certified public accountants and registered investment advisors review your entire financial portfolio in light of your current needs and future goals. We integrate your financial, estate and retirement planning with efficient tax planning to ensure that your investments and insurance are appropriate for your personal situation. We can assist you in planning for any major life event, including college, retirement, illness, and disability.

Unlike most “financial advisors”, our professionals will not try to sell you products that you do not need. Instead, we will work with you to develop options and strategies to match your financial objectives.

**Financial Planning/Investment Management**

**Estate Planning**

**Tax Planning**

**Life Insurance**

**Long-Term Care Insurance**

**Retirement Plans**

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**➤Financial Planning/Investment Management**

Contrary to popular belief, financial planning is not just for the rich. Individuals with any income level need to establish goals and develop a financial plan to achieve those goals. Our professionals will help you choose the appropriate financial vehicles – stocks, bonds, mutual funds, or annuities – and will monitor your investments to ensure that they yield the best possible return so that you’ll have the funds to fulfill your dreams. Because our fees are based on the performance of you investment, we share a “vested interest” in your goals.

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## ➤Estate Planning

Correct planning will ensure that your estate will pass to your heirs with minimal tax consequences. We will advise you of your estate planning options in light of the current state and federal tax regulations and help you implement an estate plan specifically designed for your situation.

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## ➤Tax Planning

Don't wait until the end of year to ask for tax planning advice-at that point, it's too late!!! Our registered investment advisors and certified public accountants will assist you year-round to develop tax savings strategies that will allow you to keep more of what you make.

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## ➤Life Insurance

If you died today, would your loved ones have sufficient means to maintain their current lifestyle? Would your children be able to afford college? Could your spouse continue to pay the mortgage or the real estate taxes? The appropriate life insurance policy will give you the comfort of knowing that your loved ones will have financial security after you're gone. We will assess your life insurance needs in light of your entire financial portfolio and recommend the right policy for you and your family.

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## ➤Long-Term Care Insurance

Nursing home and home health care services can quickly deplete your savings. Are you financially prepared for the possibility that you may someday be unable to care for yourself? We will help you choose a long-term care insurance policy to ensure that you will be able to afford quality care when you need it.

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## ➤Retirement Plans

Whether you need to rollover an existing 401(K) account, establish a Roth IRA or set-up a pension plan for your business, our professionals can help you choose the appropriate funds to maximize the return on your investment.

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*Securities provided through Purshe Kaplan Sterling Investments, Member FINRN/SIPC,  
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