

RICHARD THOMPSON

Solutions for Financial Freedom

Richard Thompson has been helping successful individuals discover easy methods to improve their financial health. He is committed to helping his clients by focusing on their core values. This gives him a better understanding of what is important to them so that he can help them make smart decisions about their money that result in their financial security.

His years of experience in the areas of taxes, retirement and estate planning make it possible for

Richard to combine both new ideas and proven financial strategies to help you achieve your goals. He has developed the ability to simplify complex concepts and effectively address personal and sensitive issues, all of which allow his clients to feel at ease as they move through the often confusing wealth planning process.

He has been a speaker at local Rotary groups, businesses and charitable organizations, and has presented numerous financial planning workshops. Richard has been in the financial services business for over 18 years and is considered an expert in his field. Prior to establishing his firm, Richard served 12 years as the Chief Staff Accountant for a CPA firm and 5 years as Treasurer and General Manager in private industry. His years of hands on experience in accounting and financial management give him a unique insight into an individual's financial concerns and practical experience in dealing with them.

He graduated from the American College in Bryn Mawr, PA as a Chartered Financial Consultant and The College for Financial Planning in Denver, CO and is licensed as a Certified Financial Planner™. Currently, Richard is a member of The National Association of Family Wealth Counselors and The Financial Planning Association.



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