

Financial Planning

Building Wealth, Managing Wealth, Distributing Wealth and Protecting Wealth with Insurance are four key aspects of developing a comprehensive financial plan.

We recognize the individuality of each client's situation, and using a team based approach, we assist our clients in building, managing and distributing their wealth through Comprehensive Financial Planning, Internal Investment Research and Unparalleled Service. The areas we cover, include, but are not limited to; Investments, Retirement Planning, Estate Planning, Education Funding, Special Needs Planning, and the use of appropriate insurance products for Life, Health, Disability and Long Term Care.

Our team based approach is designed to draw on the collective Insights and experience of our team of professionals and strategic alliances with CPA's, Estate and Business Planning Attorney's, Insurance agencies and Brokers.

We believe in providing the highest level of service, integrity and are focused on becoming a lifetime resource for each and every client.

Your Financial Plan will address:

- Portfolio Management
- Retirement Planning
- Survivor Needs
- Estate Planning
- Tax Planning
- Accumulation Planning
- Risk Management
- College Funding
- Federal Benefit Planning
- Business Owner Succession Planning

With regular reviews your plan, we can measure your progress and update to your change financial concerns. You can evaluate our effectiveness as planners.

To schedule a no-cost, no-obligation appointment for Financial Planning, please call Greg Genter at 313-388-6000 or ask a Member Solutions Representative for more details.

Let Us Help You Plan Your Best Life.



Gregory Genter, AIF® is a Senior Partner with Harvest Partners Financial and is ready to help you with your financial planning.

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