MENU OF SERVICES

RETIREMENT PLANNING

We evaluate retirement goals and objectives, and construct plans that align with your overall risk tolerance.

RISK MANAGEMENT& ASSET PRESERVATION

We evaluate and collaborate with hand selected partners to reduce the overall risk profile of our clients.

TAX PLANNING

We evaluate your existing tax situation and help you build a plan to mitigate exposure to current taxes in your portfolio. This step includes implementing a tax-smart investing strategy.

BUSINESS SUCCESSION PLANNING

We seek to ensure you have a plan in place to leave your business in sound financial health and under trusted leadership.

COLLEGE PLANNING

We help families explore different options that can help them save for a higher education goal so they can be less reliant on student loans.

SOCIAL SECURITY PLANNING

We evaluate your situation to help you effectively leverage your Social Security benefit.

INCOME PLANNING

We'll help you review your potential income in retirement and estimate what you could get from Social Security, pensions, or annuities.

WEALTH TRANSFER

Our mission is to help clients ensure their estate planning goals align with their retirement and portfolio management goals. Preserving your wealth for future generations.

S.O.S (SECOND OPINION SERVICE)

You can schedule a meeting and get a review of your financial plan, with no obligation to work with the advisor afterward.

TRILOGY FINANCIAL PLANNING

(915)303-8092
6090 Surety Dr. Ste 210 El Paso, TX 79905
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INVESTMENT WITHDRAWAL STRATEGIES

We help you create a strategy to potentially reduce what you pay in taxes, in retirement. It's critical to know when to access and spend your retirement savings to get the most out of it..

LONG-TERM CARE PLANNING

We collaborate with clients to help them plan for costs associated with their future personal care needs when they can no longer perform every day activities on their own.

STRATEGIC MONEY MANAGEMENT

We provide investment management guidance that is custom fit for each client and is best encapsulated as total balance sheet planning.

INVESTMENT CONSULTING

We offer services to give clients specific guidance at every stage of investment decision-making, risk management and monitoring.