WE ARE FIDUCIARIES

My clients are the focus of everything I do and I work tirelessly to provide advice that is always in their best interest. With a focus on strategic, long-term planning, I help reduce tax liability, efficiently manage assets, and reduce risk while helping build and transfer wealth over time.

JUSTIN GROSS, CFP®
PARTNER, WEALTH ADVISOR

Specializing in business & family wealth transfers

2115 Barkley Blvd. Suite 101
Belilngham, WA. 98226
(360) 714-1234
www.FinancialPlanInc.com
Justin.Gross@FinancialPlanInc.com

ABOUT FINANCIAL PLAN INC.

As a fee-only RIA serving a select number of qualified clients, Financial Plan provides first-class service including custom planning tailored to each unique situation. Our investment philosophy focuses on things we can control: risks, cost, taxes, and behavior.

About Justin

I work with successful families and individuals who desire to leave a financial legacy for their families and impact the world through charitable giving. I assemble teams of unbiased professionals to best serve the complex needs of each client- from EPAs to CPAs- thereby allowing my clients to spend more time doing the things they love while resting assured their financial future is being nurtured. My clients are best served when they understand and appreciate the value of a holistic approach to financial planning as well as the need for a steady hand in the midst of market turmoil.

Your future is bright. Let's get to work!

FINANCIAL PLAN INC.