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About The Company

At Garfield and Davis Financial, we believe that financial security is the foundation for lasting peace of mind. With a team of seasoned advisors and a client-first philosophy, we specialize in crafting tailored financial strategies that align with your life goals—whether you're planning for retirement, growing your wealth, or securing your family's future.

Our approach blends deep market insight with personalized service, ensuring that each financial decision is rooted in both data and your unique values. More than just advisors, we are your lifelong financial partners.

We take pride in building trust through transparency, integrity, and a steadfast commitment to your success.

At Garfield and Davis Financial, your future isn’t just a projection—it’s a plan with purpose.

John Garfield Bio

- John entered the financial services industry in 1989 after graduating from Embry-Riddle Aeronautical University. Over the last three decades, John has been considered an expert at retirement and estate planning.
- **Education and Professional Memberships:**
  - Northwestern Prep School, Santa Barbara, California
  - Embry-Riddle Aeronautical University, Daytona Beach, Florida
  - Million Dollar Round Table (MDRT) - Lifetime Member
  - Court of Table (COT) – Member
  - Forum member - Northwestern Mutual Life
  - Life Underwriting Training Council Fellow (LUTCF)
  - National Association of Insurance Financial Advisors (NAIFA)
  - National Quality Award (NQA)
  - National Sales Achievement Award (NSAA)

Jon Davis Bio

- John Garfield to Provide

Services

Financial Planning

- Your financial journey starts with understanding where you are, where you want to go, and how to bridge the gap. Financial planning is more than just numbers—it's a dynamic, lifelong process designed to adapt as your life evolves. We help you build a clear, actionable roadmap that addresses your short-term needs and long-term goals with confidence and precision.

Wealth Planning

- Wealth planning is about seeing the full picture—and making the most of it. Whether you're focused on growing your assets, protecting what you've built, or creating a legacy, we tailor strategies that reflect your values and priorities. Our role is to simplify the complex, so you can focus on what matters while knowing your wealth is working intelligently for you.

Retirement Planning

- Retirement is not an end point—it's a new beginning. With decades of retirement to plan for, our approach is both strategic and deeply personal. We design forward-thinking plans that aim to maximize growth, ensure tax-efficient income streams, and preserve wealth for future generations. The result? A retirement lifestyle that reflects your vision, supported by a plan built to last.

Resources (John to Provide)

- Articles
- Videos
- Market News
- Financial Calculators
- Client Testimonials

Contact Us

- Garfield and Davis
- 515 West Avenue, PH65 Norwalk, CT 06850

- (203) 913-3279
- john@garfieldfinancial.com