

## *Financial Planning Solutions Inc*

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Thank you for visiting the homepage of Financial Planning Solutions, Inc. We are an independent registered investment advisory firm headquartered in Carlsbad, California. Shelley Lee Boyce is an established CERTIFIED FINANCIAL PLANNER™ practitioner.

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Submitted by Financial Planning Solutions, LLC on April 18th, 2019. Recently we've been approached by a few prospective clients who are just about to retire and would like a financial plan. Most have worked hard for years and now want to stop working. They are unsure how many more years they will want or be able to work.

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Our clients look for us to guide them through a myriad of planning complexities. We partner with our clients and their advisors to simplify and add value to their financial future. James M. O'Neil Jr., Esq., AEP® Senior Vice President / Managing Director of Private Client Services

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