Achieving Your Goals - Short Term, Long Term & Everything in Between

Whether it's saving for your child's college education, protecting your family's future with life insurance, or planning for your own retirement, MITFCU Financial & Retirement Services can help you develop your financial strategy with a no-cost, no-obligation analysis. We have the knowledge and experience to provide guidance and recommendations for financial situations - from the basics to the most complex - that impact your financial planning objectives.

Our primary areas include:
- Retirement Planning
- Education Planning
- Estate Planning
- Charitable Giving
- Wealth Management

Our Financial Planning Methodology
Four Simple Steps

Identifying and defining your desired goals gives us an understanding of what it is you want to achieve, then we can help you get there.

A thorough analysis of where you are now, provides a clear picture of your current resources and needs.

Once we know what you want to achieve, we can begin to develop a plan to help you get from where you are to where you want to be.

With ongoing monitoring and periodic evaluations, we’re able to assess progress toward goals and make adjustments to both the strategy and the goals as needed to keep everything on track.

Let's start the conversation...

mitfcu.org/home/FRS
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