Who We Are

We are a team of financial service professionals with over fifty years of combined experience in income and tax planning, portfolio analysis and management strategies, retirement planning, risk management and wealth transfer. We are skilled in the integration of employer-provided benefits, investment selection and monitoring and the tax-sensitive realities of long-term care and estate planning. Our unified objective is to help you define and achieve your goals.

What We Do

We work closely with you to understand your unique circumstances and resources. We use this understanding, along with our extensive knowledge of financial services and products, to create a comprehensive plan, complete with recommendations, designed to help you achieve prosperity as expressed by your objectives and your vision. In the process, we work with your attorney and accountant, or help you find appropriate tax and legal professionals as necessary, to make your plan effective.

Why It Matters

Who you choose to implement your financial plan is your decision, and staying on course to achieve important lifetime goals can be difficult. Our experience shows that successful execution of your financial plan requires both a high level of dedication to the objectives of the plan and the flexibility to make appropriate adjustments in strategy over time. We believe the course to attaining your goals will be more consistent and profitable when your efforts are supported by our attention, insight and capability. Throughout your relationship with us, our goal will be to help you achieve yours.

Robert J. Langan
AIF®, CLTC, CFBS, C(k)P

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Qualifications

Over 25 years of experience
BA, Business Administration Elizabethtown College
Graduate Central Atlantic School of Trust (PBA) University of Bucknell
Life & Qualifying Member, Million Dollar Round Table, 1995 to present
AIF (Accredited Investment Fiduciary)
C(k)P (Certified 401(k) Professional)
CLTC (Certified in Long Term Care)
CFBS (Certified Family Business Specialists)

Professional Specialties

Retirement Plan Design and Implementation
Financial Planning Services
Estate Planning
Asset Allocation Strategies
Long Term Care Insurance
Life and Disability Income Insurance
Charitable Giving
Business Succession Plans
Executive Compensation Design
Employee Benefits Design and Management
Risk Management Strategies