FINANCIAL GROUP
FINANCIAL PLANNING • INSURANCE • INVESTMENTS • SINCE 1890

114 Foxshire Drive
Lancaster, PA 17601
(717) 569-6369
800-714-9359 Toll Free
(717) 581-0670 Fax

Wes is dedicated to connecting with you on your journey to financial clarity. We know maximizing yourself, your family, your business, and your retirement can be complex. We help simplify the process with three easy steps.

- ***First, we will assess your personal circumstances by evaluating your family values and dynamics, reviewing your current financial position, weighing your current financial strengths and weaknesses to help guide you to financial success.***
- ***Second, we will pull together your personal "game plan" by outlining your options, providing recommendations to help make sure you are properly protected and capitalizing your opportunities.***
- ****Third, if our recommendations make sense to you, we can help with implementation so that you will clearly know where you are headed, feel confident in your financial decisions, prioritize and become proactive in attaining your goals and maintain your independence and dignity. You can rely on us to help you deal with the inevitable changes that come along the way.***

Our Vision:

A thriving financial services practice where business owners and retirees are confidently moving toward their goals and taking full advantage of the array of planning tools appropriate to their unique circumstance.

Our Mission:

Clients receive customized financial advice by integrating successful business owners or individual's values, family and goals so they can move forward with confidence.

Our Values:

We recognize and appreciate that each person has unique values and strive to bring customer tailored options that match with each client's perspective.

Wesley Carr, Jr., ChFC®

PROFESSIONAL SPECIALTIES:

- Integrating the business owner's personal and business planning to maximize the use of assets to help meet the business and personal objectives, including estate succession and family issues
- Comprehensive Financial Planning to help people reach important life goals
- Retirement Income Planning Strategies to help clients maintain financial independence
- Wealth Management to help manage investor behavior to maximize the opportunity to meet long term goals

QUALIFICATIONS:

- Financial services since 1994
- Chartered Financial Consultant
- Certified in Long Term Care
- Certified Family Business Specialist
- BS in Engineering

PERSONAL:

On a personal level, Wes is married with two sons and currently resides in Lancaster. He attended Messiah College and received a BS in Engineering with emphasis in Mechanical Engineering. He regularly attends various educational meetings on subjects of retirement planning, investment management, estate planning and business succession. During his personal time he is an avid reader, rides dirt bikes and hunts. He is a member of the following organizations:

- Lancaster Rotary
- Board member of Messiah Lifeways since 2002
- Estate Planning Council of Central, PA and Lancaster
- Senior Education Institute

Wes's primary office is in Lancaster, PA

*The producer's relationship with the client during post-plan delivery is as a Registered Representative and not as a fee based Financial Planner. The client is free to implement the plan recommendations with whomever he/she chooses