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Mission Statement

It is my mission to make a material difference in my clients' lives by joining in partnership to proactively focus on the critical financial issues that present themselves on a regular basis. To assist my clients by bringing together research, perspective, experience, and products so that sound financial decisions can be made. This focus is to foster the creation and preservation of wealth to establish financial independence today and maximize the perpetuation of the wealth for the benefit of generations to come.



William H. Martin, CLU® ChFC®, CFP®

PROFESSIONAL SPECIALTIES:

- Financial Planning
- Estate Planning
- Asset Management
- **Risk Management**
- Retirement Planning
- Pension Design
- Charitable Giving

QUALIFICATIONS:

- B.S. Finance/Economics Penn State University
- **Certified Financial Planner** Professional
- Chartered Financial Consultant
- Chartered Life Underwriter
- Life member Million Dollar Round Table
- Over 36 years of experience
- Managing Partner uFinancial Group

PERSONAL:

William's outside interests include racquetball, golfing and spending time with his wife Amy Sue and his three children Scott, Christian and Jessica