

Thomas Weber



Tom Weber, financial advisor at Ufinancial Group, understands that most people are nervous about retirement. *“You spend your whole life trying to turn your income into an asset and then suddenly you need to figure out how to turn your assets into income. That can be very unsettling for some people.”* That’s why his goal – and the firm’s – is to take the uncertainty out of planning for retirement so that clients know exactly what will happen when they stop working. To help them understand what they have and what they will need, Tom conducts a thorough review of each client’s finances; analyzing data, uncovering gaps and liabilities, and offering solutions. In a world of changing and confusing financial information, Tom helps his clients make educated decisions for a more secure financial future.

Tom looks for holistic strategies that will provide significant benefits for clients, making sure to build a comprehensive strategy that integrates their investments with their insurance protection. Tom makes sure that the strategies put in place will be appropriate both now and into the future by providing regular reviews and ongoing service.

After growing up in the restaurant business, Tom began his professional career as a general manager at a well-known, high-end steakhouse chain. His interest in financial services started with life insurance purchased as part of the planning process for himself, his wife and their children, and he decided to pursue a career as a financial advisor. Tom became fully aware of the powerful effect planning can have when he delivered a life insurance claim to a client whose wife had died unexpectedly. Knowing that a grieving family didn’t have to worry about money because of the insurance plan he helped put in place showed him clearly the good that he could do and the impact it could have.

Tom resides in Halifax, PA, with his wife Lori and their three young children. Tom and Lori are both very involved in the local schools; Lori works for the school system and Tom is School Board Director. Tom enjoys golf and photography, and loves to take the family camping on vacations. While his own retirement is quite a ways away, you can be sure he’s got a plan in place for a secure future for himself and his family.

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