

INDIVIDUAL FINANCIAL SERVICES



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Jumet Financial delivers comprehensive financial strategies for individuals and families, including personalized budgeting, debt management, strategic investment planning, tax optimization, retirement preparation, and estate planning.

BUDGET MANAGEMENT

We help you evaluate your spending by prioritizing what matters most to you while building wealth.

DEBT MANAGEMENT

We guide you in determining which debts to pay off first while helping you build wealth along the way.

DEVELOPMENTAL GOALS

We guide you in determining which debts to pay off first while helping you build wealth along the way.

INVESTMENT PLANNING

We pride ourselves on independence, as we are not tied to any specific product or investment vehicle, allowing us to tailor your investment portfolio to fit your financial objectives.

CORPORATE STOCK MANAGEMENT

We help in evaluating, monitoring, and diversifying concentrated employer stock positions to build a more balanced and resilient investment strategy.

TAX PLANNING

We provide year-round insights to help you prepare for tax season and identify opportunities to reduce your tax burden.

RETIREMENT PLANNING

We guide you in planning for retirement, from choosing when you can retire to determining the best time to start benefits.

EDUCATION PLANNING

We aid you in planning for the anticipated cost of education by assisting in setting up education savings plans and navigating financial aid options.

INSURANCE PLANNING

We help you evaluate your need for life insurance and, if necessary, find a cost-effective solution tailored to your individual needs.

ESTATE PLANNING

We guide you in developing an estate plan that aligns with your financial landscape by reviewing your existing documents and assisting in taking the next steps to ensure that your plan is complete.

www.jumetfinancial.com

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Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Jumet Financial via Western Wealth Management, a registered investment advisor. Tax Services offered through Jumet Financial Tax Services LLC. Jumet Financial, Jumet Financial Tax Services, and Western Wealth Management are separate entities from LPL Financial.