



Tracey Simonson, CFP®

The Simonson Group

Plan • Focus • Achieve

How Can a CERTIFIED FINANCIAL PLANNER™ Help Me?

If your goal is to achieve financial independence, then it may be wise to have a professional there to support you towards your financial goals. A CFP® may be just who you're looking for.

A CERTIFIED FINANCIAL PLANNER™ meets the following requirements and adheres to the Financial Planning Board of Standards:

- EDUCATION – Coursework in curriculum approved by CFP Board.
- EXAMINATION – Pass a 2-day, 10-hour applied knowledge test.
- EXPERIENCE – At least 3 years minimum planning experience.
- ETHICS – Abide by strict code of professional conduct.

These four E's define the core values of financial planning, and you can expect a CFP® to act with integrity, offering you professional services that are objective and based on your individual needs.

If you have questions about how I apply my CFP® certification in my practice, I'd be happy to schedule a time to meet with you. At *The Simonson Group of Focus Financial*, we look forward to helping you and your families.

Get Started Today and meet with us to learn how Tracey, as a CERTIFIED FINANCIAL PLANNER™ can help you **Plan • Focus • Achieve!**

Contact us today: 651-462-7636



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