

Financial Planning

Financial planning is a lifelong process. A meeting with a financial planner can help you:

- Assemble the pieces of your financial puzzle in one place, piece by piece;
- Reduce anxieties about financial issues and replace them with a sense of control

Very often, implementing a financial plan can save you time and money, two things everyone is looking to regain. A sound financial plan can help you more fully understand your current financial state, where you want to be, and how to get there.

Rockland Trust Investment Management Group provides access to:

- ✓ *Dedicated financial planner*
- ✓ *Distinct financial planning process*
- ✓ *Personalized, local service*
- ✓ *Full range of investment options and capabilities*

Where are you now and where do you want to be?

A big part of understanding your future financial goals is understanding your current financial situation. Taking the time to meet with a financial planner will help you more fully understand how decisions made today can impact your future, including identification of key risks that may inhibit the achievement of your goals. A clear understanding of your current resources helps you to get organized, create a path to success, and empowers you to make informed decisions.

How do you get there?

The first step in the financial planning process is identifying your goals. This is a collaborative effort, where you and your trusted advisor work together. Your advisor will prepare a written analysis of your personal financial situation that will lead to a set of action steps to help you fulfill your financial vision. Understanding and identifying the whys of what you're trying to accomplish is pivotal in achieving financial security.

Why Rockland Trust?

At Rockland Trust, we understand the importance of financial planning in your overall financial well-being. That's why we have a dedicated financial planner on staff, providing unbiased advice to help you reach your goals. Unlike other firms, we believe in a clear separation of the financial planning and investment management processes. By focusing solely on the strategic steps you need to take to achieve your goals, we empower you with the necessary tools to work effectively with your investment manager and other professional advisors, putting you in control of your financial future.

For more information, contact:

ROCKLAND
TRUST®

Investment
Management Group