

Twenty Years in the 'Dream' Planning Business

Financial Independence Planning, LLC

For many, the offices of Financial Independence Planning have been a gateway to a new world of possibilities – a retirement enriched with fun.

That's clear in the photos Harry Keller's clients send him – the exciting travels, family time, the snazzy wheels, the cool hobbies and the pets. For many of them, good planning has been the key, and Financial Independence Planning, LLC is the firm behind the strategy.

"As a client, your job in retirement is to have fun."

— Harry Keller

Keller, CPA, CFP®, ChFC, CLU, MBA, is CEO of Financial Independence Planning. He's been a Top 10 advisor – out of more than 2,500 – with Voya Financial Advisors for 10 consecutive years, based on Voya's Leader's bulletins. In 2015, the firm he founded is celebrating its 20th year of helping clients make well-informed choices that will help work toward enabling them to enjoy what's important to them and not worry about money.

'It's the Process that Builds Confidence'

Financial Independence Planning's team, with \$700 million in assets under management, uses an eight-point process to get clients where they want to go.

It includes an exploration of goals, taxes and investments; charting a plan and reviewing it; and quarterly and annual check-ups. Along the way, the advisors consult with either FIP's in-house

CPAs and attorneys*, or the clients' CPAs or estate planning attorneys to tie all financial areas into one complete plan. In addition, the well-staffed customer services department follows a finely tuned FIP process to consistently deliver the highest level of customer satisfaction.

"To enrich our clients' experience, we offer quarterly educational seminars and various fun events throughout the year. The fun ranges from golf and tennis clinics and minor league baseball games to ballroom dancing classes. We practice having fun in retirement," says Keller.

Carolyn Choh, MBA, Registered Representative who also handles the firm's marketing, says the firm's stability is rooted in helping executives in transition, whether that's retirement or a downsizing. "We've been able to offer solid advice as they look to the future. Also, many of our long-time clients are now establishing succession or family plans."

Are You Still Having Fun?

Many Financial Independence Planning professionals have also worked in other industries, so they bring valuable perspective from other fields. Keith Hooper,



CPA, MS, for example, was a CFO with a major nonprofit organization. Adam Peltzman, CFP®, RHU is a health insurance professional and is a resource for the whole team. Bruce Musselman has 27 years as an HR manager at a major food company. Glenn Kopsky, CPA, CFP® and Tom Malkoch, CPA, CFP® provide professional and tax services*. Carolyn Choh, MBA, a product director at a Fortune 500 pharmaceutical firm and professor at a regional university, also transitioned to FIP. Jared Keller, Harry's son, has worked for five years with Harry, helping his ideal clients and their children. Jared notes, "We want to ensure that clients are not only on the right track with their financial road map, but they have an exceptional FIP experience." The entire team is solidly professional, focused on clients' goals.

"As a client, your job in retirement is to have fun," says Harry Keller. "Our advisors call all their clients every quarter to make sure they're having fun and not worried about the financials."

That's dedicated, effective financial planning. And it keeps those postcards and photos coming in.

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