Investments, Insurance, and Financial Planning

When it comes to planning for your future and dealing with everything from college planning, retirement planning, or even estate strategies, it can help to have someone who's experienced and knowledgeable to assist you along the way. The Member Wealth Management team works closely with our members to provide them with strategies that help with their unique situations.

Member Wealth Management services include:

Retirement and income strategies
Investment analysis and portfolio allocation
Wealth transfer and estate planning strategies

Investment services include:

Mutual funds
Fixed and Variable annuities
Traditional and Roth IRA's
529 plans (college savings plans)
Individual stocks and bonds
401 (k) and other retirement plans

Insurance services include:

Life Insurance
Disability Income Insurance
Long Term Care Insurance

For more information about Member Wealth Management, please call Shavon Roman today at (770) 353-0486 or email her at sroman@financialguide.com. Additional information regarding Member Wealth Management is also available at www.memberwealthmanagement.com.

CRN201507-173977