Financial Planning

Age Requirements
18 and over
Other Eligibility Criteria
Ages 45 to 95; liquid networth of 250K and a household income of 100K (exception to income for special needs and senior care planning).
Intake Contact
Jonathan Peyton
Intake Contact Email
info@hrwmgmt.com
Intake Process
Call the office; make an appointment; services in person or by phone or by web
Intake Contact Telephone
(877) 501-4796 x700
Provider Refer
Yes
Report Problems
Send an Email
Self Refer
Yes
Horizon Ridge Wealth Management
https://www.hrwmgmt.com
http://hrwmgmt.com/financial-planning/
https://www.facebook.com/horizonridgewealth/?fref=ts
Main
(877) 501-4796
Toll-Free
(877) 501-4796

Center Plaza Suite
20130 Lakeview Suite 400
20147 VA
United States

Monday: 8:30 am-5:30 pm
Tuesday: 8:30 am-5:30 pm

Wednesday: 8:30 am-5:30 pm
Thursday: 8:30 am-5:30 pm
Friday: 8:30 am-5:30 pm
Saturday: Closed
Sunday: Closed
Additional Availability Comments
Services by phone from 5:30pm until 7:00pm Monday through Friday
Fee Structure
Fee Range
Payment Method(s)
Private Pay
Languages Spoken
English

Horizon Ridge Wealth Management provides a 90 minute comprehensive financial planing review for individuals and families. In the review we cover two areas or topics important to the couple or individual, a high level financial review and retirement analysis; risk assessment; and protection concepts.

Service area also covers cities in Maryland: Bethesda, Rockville, Silver Spring and Frederick

Securities and Financial Planning offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. The information and opinions posted on this website do not necessarily reflect the opinion of LPL Financial or its affiliates.

Service Area(s)
Alexandria City
,
Arlington County
,
Fairfax City
,
Fairfax County
,
Falls Church City
,
Loudoun County
,

Washington DC
Email
info@hrwmgmt.com