

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>

<https://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