[Special Needs Financial Planning](#)

Age Requirements
18 and over
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/special-needs/
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 offers financial planning to protect your special needs child from the outside world when you are no longer able to help. Advance planning is a must for those children with severe disabilities, as they do not always know who to turn to for guidance.

Financial planners can provide a detailed action plan for families with special needs children. By partnering with the extended family, guardians, and/or attorneys to outline a financial support strategy, our team can provide ongoing investment management and distribution services as needed.

Within each financial disability plan we consider the importance of:

- Inter-generational and sibling family dynamics
- Financial planning that addresses disability laws
- Special needs trusts
- Life insurance
- Government assistance
- The ABLE Act
- Estate planning techniques to protect your child’s best interests
- Retirement planning for you and your special needs child.

While we do not provide legal advice, we can work closely with the attorney and legal guardian to ensure assets are managed in accordance with the investment objectives laid out in their carefully crafted Special Needs Planning documents. Whether funded from investable assets, or through a life insurance policy, our team can assist with the account creation, account funding, and asset management during, or after, your life to ensure your child’s financial resources are handled appropriately.

Service area also includes 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