

WE INVEST IN YOUR *Happiness*

We're here to help you uncover and achieve your life's goals by providing you with everything you need for true wealth, health and lifelong fulfillment.

OUR WHY

To uncover and achieve your life's goals, so that we can bring true happiness to as many people as possible.

OUR GOAL

At Diversified, we provide our clients with everything they need — through a deeper, meaningful connection that guides them to happiness and lifelong wealth.

CORE SERVICES



FINANCIAL PLANNING

A customized Lifelong Wealth plan designed around your specific goals and life stage.



RETIREMENT PLANNING

Holistic guidance to alleviate stress and help you realize your retirement dreams.



INVESTMENT MANAGEMENT

Diversified portfolios built on active & passive strategies aligned to your risk tolerance.



TAX PLANNING

In-house CPA expertise crafting cohesive tax-savings strategies for today and the future.



ESTATE PLANNING

Confirm your wishes are honored as you pass your legacy on to future generations.

LIFELONG ADVICE MODEL

We start by understanding your current life and finances, then work together toward your goals — keeping your "why" at the center of everything.

1

How do I feel about money?

2

What's my perfect financial life?

3

Where do I stand?

4

How do I move forward?

5

How do I know if I'm on track?

“What makes us happy is knowing that through our partnership our clients are able to achieve real wealth, health, and happiness.”

— Andrew Rosen, CFP®, CEP® | Executive Chairman, Diversified LLC