

Finance *for* Teachers

why we do it

We believe that everyone should have access to a financial planner. Being a teacher, we understand that you have specific concerns. We understand those concerns because we are married to teachers and deal with them ourselves. Finance for Teachers is designed to only work with people like you, and to make sure you receive the customized service you need.

how we do it

We listen. We listen to you talk about your life and what you want to achieve. You help us understand your passions and dreams and we work on understanding how much they will cost. We do the number work and show you if it can all become a reality. We don't believe money is the goal, but is the tool to make dreams come alive.

what we do

Through the process of financial planning and investment management, we help you financially prepare to live the life you dream of. If those dreams are unaffordable, we will help you design a life that you can afford. We make sure all areas of your life are protected to prevent financial ruin and advise you of how much risk to take to realize your dreams.

Work *with* Us



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hourly planning

Designed for those on a limited budget or who want a financial check-up, you can hire a “Finance for Teachers” financial planner by the hour. We’ll discuss the topics of your choice within your set time period or budget and then bid farewell when our time is up. If you have any more questions, just come back and repeat the process.

video planning

For those who would rather be trained in how to design their own financial plan from the comfort of their couch, video training is the plan for you. Through our multi-session video-training series, you’ll learn the different facets of a financial plan, specifically with teachers in mind. You’ll be given step-by-step instructions on how to put together a plan and how to monitor it in the future.

comprehensive financial planning

The most commonly used model among our clients involves working one-on-one with a planner over an extended period of time. By paying a monthly retainer, teachers get unlimited access to a planner who will work with them to design their plan, but who will do the majority of the “heavy lifting” for them. The planner will monitor the plan, recommend any changes and ensure the plan is up to date.