

Financial Planning

Age Requirements

18 and over

Available 24/7

No

Family

No

Intake Process

Call for appointment

Self Refer

Yes

West Financial Services, Inc.

<http://www.westfinancial.com>

Main

(703) 847-2500

Toll-Free

(800) 445-1556

2010 Corporate Ridge Road, Suite 530

22102 VA

United States

Fee Structure

Fee Range

Payment Method(s)

Private Pay

Languages Spoken

English

West Financial Services offers financial planning services for individuals, businesses, and associations.

Individual financial planning includes comprehensive financial planning consisting of

financial statement analysis, investment review, income tax planning, retirement planning, insurance analysis, and estate planning.

Business planning includes the development of strategic business plans, management structure review, marketing, and sales analysis, executive compensation analysis, retirement plan review, and establishing financial goals. Investment management that provides a broad array of investment products and services not customarily available to retail investors, such as block trading, load waivers, prime broker, exclusive mutual funds, fund manager access, institutional discounts, and private research.

Service Area(s)

Alexandria City

,

Fairfax City

,

Fairfax County

,

Falls Church City