New Financial Concepts

Expanding Your Horizons

There is no single plan that's right for everyone. Individual situations require personalized attention. That's why New Financial Concepts takes the time to consider your needs and goals when helping develop a financial plan for your future. New Financial Concepts offers services and advice in the following areas:

Retirement Planning

- Pension & 401K Rollover
- Self Directed IRA's
- Retirement Income
- Income Replacement Plans

Investment Strategies

- Risk Management
- Portfolio Diversification
- Tax Favored Investments
- Mutual Funds
- Minimizing Taxes
- Stocks, Bonds

Long Term Care Protection

- Medicaid Qualification
- Home Health Care
- Nursing Home Insurance

Estate Planning

- Wills *
- Charitable Trusts *
- Living Trusts *
- Estate Preservation Trusts *

Your representative at New Financial Concepts will analyze your needs and suggest methods intended to help maximize your benefits, reduce cost and minimize tax impact. We know that a satisfied, well informed client will become a long term client. At New Financial Concepts we place high value on long-term relationships. Through teamwork, education and service we strive to achieve that goal.

* Legal Advice provided through David E. Nelson, LLB & Estate Planning Attorney.