



Moira Ozuna specializes in financial planning for individuals, families, and small businesses. Helping her clients build a personalized and unique plan to do the things they want now, while still planning for the future. Your plan will consider where you are today, and where you want to go, while still being flexible for when life throws surprises your way.

Services include any/all of the following depending on individuals and their goals:

- Personalized, comprehensive plan
- Risk management- life insurance, disability insurance
- Plan to pay down & manage debt
- Retirement planning
- Grow wealth
- Saving for kid's college
- Planning your estate
- Save for big purchases
- Business planning

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