

Financial guidance, education and peace of mind



For Chris Cooper, financial serenity means peace of mind. In fact, his business, **Serenity Wealth Management**, is built on it.

"Financial serenity is the peace of mind to enjoy the lifestyle you deserve no matter what is going on in the world and economy around us. We work hard to save for our financial future; it's important to save efficiently with your goals in mind," Chris said.

Goal-based planning plays an essential role in securing this kind of financial peace. It starts with individual goals and then a thorough review and understanding of key concerns unique to each person, he said.

"Goal-based planning, accounting for various financial risks is really important. I'm a big believer in having a plan and working with a trusted partner who can keep

you in check, provide education, explain the tools you're unfamiliar with and serve as your guide when making financial decisions," he said.

An investment advisor, insurance agent and CPA, Chris provides customized financial plans for individuals, families and business owners. His holistic approach includes accumulation, income and distribution, estate and long-term care planning. He provides advice on investments and insurance always through a lens of tax-efficiency.

Chris hosts educational events in the St Charles Community to share his expertise on key financial concepts influencing your financial serenity. There are two options for his upcoming workshop "Principles of Retirement Planning." Both are at Walnut Grill in O'Fallon, one on Thursday, Feb. 15 and one on Tuesday, Feb. 20.

See his website for more information. Or request a free copy of his book "A CPA's Guide to Tax-Free Strategies for Long-Term Care."

Get to know Chris and learn more about the path to financial serenity.



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