

ABOUT CORNERSTONE

Financial Solutions Through Education

We are a solutions-oriented firm committed to assisting affluent individuals, entrepreneurs, and their employees. We devise comprehensive plans designed to proactively navigate the evolving business climate, market trends, and tax regulations.

Our firm prioritizes our clients' needs, collaborating closely to craft tailored plans. These not only meet immediate objectives but also amplify earnings and savings through distinctive and often underutilized risk management and tax-reduction strategies. Our goal is to ensure our clients earn more and retain more!



OUR MISSION.

To create an environment where people can reach their personal and financial goals. Our mission and values include exceeding our client's every expectation. Look through this brochure to discover our Core Values and investment philosophy and see how we stand apart from the rest.

Call us today to find out how we can suggest long- and short-term strategies that will help you realize your financial dreams.



CONTACT US



EMAIL

Info@CornerstoneFRA.com



WEBSITE

www.CornerstoneFRA.com



ADDRESS

161 Madison Avenue
Suite 230
Morristown, NJ 07960



PHONE

(973) 343-5045



Cornerstone
FINANCIAL SOLUTIONS THROUGH EDUCATION

FINANCE IS NOT MATH,
IT'S DISCIPLINE.





OUR SERVICE

Our firm specializes in helping individuals develop sound retirement strategies. If you are retired – or approaching retirement – please take the time to explore our website and the wealth of information we offer. We offer personalized, hands-on service. We educate our clients about financial concepts and products and take the mystery out of investing, insurance, estate conservation, and preserving wealth.

We understand the many challenges of retirement today and know the biggest concern for many is outliving their money. We focus on our clients and their goals, as well as issues that are critical to your financial well being.



INVESTMENTS



FINANCIAL PLANNING



INSURANCE



OUR PHILOSOPHY

Our Philosophy at Cornerstone is to look at your financial landscape like a mountain. On one side, we have the way up or the *Accumulation Phase*. This side of the mountain is interest-driven acquisition of assets, and involves taking more risks to set up the second phase of your life.

The down-the-mountain portion of one's financial landscape is the *Distribution Phase*. This is more of the income-driven phase of one's landscape. How do we now turn the assets we have acquired into income for our retirement and minimize as many risks as possible for the second half of our life?

