

“A goal without a plan is just a wish”

—Antoine de Saint-Exupery, French Writer

At Mirsky Financial Management Corp., we work as your partner to develop financial strategies that help you achieve your life plan goals and then maintain what's most important to you and your family for decades to come.

Our holistic investment strategy starts with a review of your Financial Condition and takes your overall financial picture (including your tax return, insurances, estate documents, cash flows, etc.) into account when suggesting solutions. Your existing assets and liabilities, along with an understanding of your future dreams, work in concert with your disciplines when it comes to designing an investment strategy that can withstand storms and capitalize on clear skies.

Our planning takes every aspect of your financial life into account and provides you with critical advice customized for your specific and exclusive situation.

Our Comprehensive Planning Services Include, but are not limited to:

- Current and future cash flow analysis (cannot plan properly without this)
- Financing suggestions for education, mortgage and other major purchases
- Tax planning, preparation and representation
- Estate planning and assistance with administration
- Retirement planning and disciplined saving techniques
- Investment management, implementation and ongoing advice
- Survivorship planning
- Charitable gift solutions
- Employer sponsored plans oversight, and investment recommendations
- Business ownership guidance
- Adequacy of insurances and long term care

