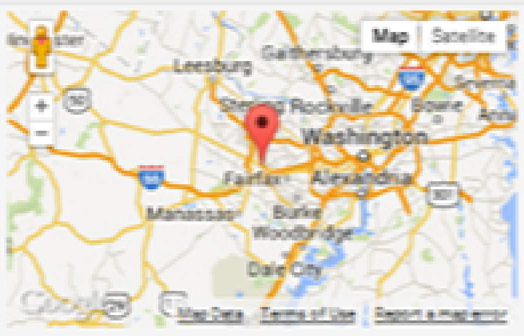
No Logo Available

John Doe Financial Planning

12150, Monument Drive
Suite 400
Fairfax, VA 22033

Your Future is Our Future

[Compare John with other financial advisors in Fairfax, VA]



Video

No Photo Available

John Doe
CERTIFIED FINANCIAL PLANNER™ Certificant

Biography

Joined John Doe Financial Planning in 2004. John Doe began his career in the financial services industry in 2000. Successfully completed the series 6, 7, 63 and 65 examinations administered by FINRA. Earned a Master of Business from Oxford University. Hobbies include wakeboarding, skiing, playing hockey, cycling and spending time with kids.

About

We are dedicated to providing an Advisor - Client relationship unlike anything you may have experienced in the past. We do this by treating our engagement with the heart of a teacher and not as a sales person. We keep in close touch with our clients and mandate that telephone calls are returned within 24 - hours. We know your time is valuable and therefore meetings can be held in your home during the day or evening for your convenience. May be more important than all of the above is that you will have an understanding of what your investments are how they work and what you can expect from them. We explain things in terms that you will understand so that you have a high comfort level with what you own.Full service financial planning, we currently serve 400 clients and $70,000,000 of assets under management. Fully independent Broker Dealer with no proprietary products to sell.

15 Years of Experience

- SEC File# 6533443
- CRD# 231654
- Firm CRD# 323332
- Insurance License# 75335464
- Series 6, 26, 28, 66

Research This Advisor

www.finra.org
www.sec.gov
www.sipc.org
www.aicpa.org
www.naic.org

My Services

Financial Advice & Consulting

Your Service Profile is the best way for potential customers to learn more about the products and services you provide. A thorough, detailed description about your service is your best asset; avoid broad statements like "we are a great business". Be sure to include important information about your services, for example: year established, service area, type of services you provide, and any other applicable information.

Communities Served

Fairfax
Falls Church
Gaithersburg
Mc Lean
Reston
Vienna

Office Hours

Sun.	9:00 AM - 5:00 PM
Mon.	9:00 AM - 5:00 PM
Tue.	9:00 AM - 5:00 PM
Wed.	9:00 AM - 5:00 PM
Thu.	9:00 AM - 5:00 PM
Fri.	9:00 AM - 5:00 PM
Sat.	9:00 AM - 5:00 PM

General Information

Firm Start Year:	1998
No.of Employees:	20-49
Insurance License#:	75335464
Name of Broker/Dealer:	Wall Street Financial Group
Name of Custodial Firm:	National Financial
States Licensed in:	VA,MD
Number of Years with Current Firm:	10
I work with the following types of clients:	Individual Investors , Investment Clubs
Foreign Languages Serviced:	English, French

Services

Investment Types:	Exchange Traded Funds (ETFs) , Alternative Investments , Mortgages & Real Estate , Mutual Funds , Stocks , Bonds

Qualifications & Memberships

Insurance and Annuity Licenses:	Casualty , Annuity , Long Term Care
Financial Organization Memberships:	National Association of Insurance and Financial Advisors (NAIFA) , Million Dollar Roundtable , Garrett Planning Network , American Institute of Certified Public Accountants (AICPA) , Society of Financial Services Professionals , Paladin Registry
Non-Financial Organization Memberships:	Tested Organization

Firm Information

I work with clients as part of a team:	Yes
Firm's Number of Clients:	400
Firm's Number of Planning Clients:	200
Firm's Number of Managed Clients:	200
Assets Managed by Firm:	$70,000,000
Advisor's Number of Clients:	400
Advisor's Number of Managed Clients:	200
Advisor's Number of Planning Clients:	200
Assets Managed by Advisor:	$10,000,000

Compliance

Registered Investment Advisor:	Yes
Registered Representative:	Yes
Investment Advisor Representative:	Yes
I am an acknowledged fiduciary:	Yes
Compliance Disclosures in Last 5 years:	I have a clean record
Criminal Disclosures in Last 5 years:	I have a clean record

Compensation & Fees

Fee Structure:	I am a Fee-Only financial professional
Minimum Portfolio Size for New Managed Accounts:	$50000
Compensation Methods:	Hourly

Compensation Arrangements

Check
Money Order
American Express
Diners Club
Discover

News & Events

Finance Bootcamp
When: 09/01/2014 00:00 |
Location: Town Hall
Details: To make aware about all financial investment options.

Awards & Recognitions

Best Financial Servicess (12/01/2010)

For best service to all clients

Click Here To Contact This Provider To Get More Information

FAQs

Q. Do you have a customer satisfaction or refund policy?
yes

Q. What are your qualifications? What is your education background?
MBA

Q. What services do you offer?
Financial planning, Retirement Planning, Tax Planning

Q. How many clients do you currently manage?
400

Q. Will you be the only person working with me?
No

see more

Social Networks

Advisor Comparison

- [x] John Doe
  John Doe Financial Planning
- [x] Trow Trowbridge
  Dominion Wealth Management, Inc.
- [x] Pat Volk
  The Mutual Fund Store - Washington DC - Reston

Compare Advisor

* Financial Advisors in our network may be dually registered; advisors, in addition to being registered as an RIA, may also be registered representatives offering securities through broker dealers.

** We pre-screen advisors for:
- **Experience** (minimum FIVE years required) - **Advisor Compensation** (fee-based or fee-only*) - **Licensing and disclosures** with SEC/FINRA

TOP