Financial Advisors in Columbia SC Launch Brand New Website with Online Appointment Booking

June 23, 2021

June 23, 2021 -
McDaniel Corp, a company of financial advisors based in Columbia, SC, has recently launched their brand new website that now allows online appointment booking. They are currently building the site out as they see the need for financial advisors to be more online and digital, in their interaction and in their approach to promote the service to potential clients. The financial advisors provide a broad range of financial services, including retirement income planning, investment analysis and planning, risk management, tax strategies, estate planning, and other services.

Craig McDaniel, president of McDaniel Corp, says, ?As financial advisors, we offer various kinds of services to meet the financial goals of our clients. We work closely with clients to find out their needs and then recommend appropriate strategies and actions. We have a professional staff of dedicated, knowledgeable, highly competent, and experienced personnel who are licensed and trained to provide a wide range of financial services.?

Retirement income planning has several purposes. These include: raising retirement income? 401(k) rollovers and IRA transfers; and retirement distribution planning from IRAs and other qualified retirement arrangements.

Investment analysis and planning has several benefits. These include: portfolio analysis and design; matching investment vehicles with the client?s goals and needs; assessment of specific investments; analysis of tax consequences; and evaluation of risk return trade-off.

The risk management services offer several advantages. These include: ensuring sufficient family income in case of disability or death; identification of present and future risk exposure;
assessment of the cost-effectiveness of present coverage; and long-term care protection.

They also offer guidance with regards to tax strategies. Benefits include: optimization of potential tax deductions; income shifting between family members; deferral of taxes; and reduction of taxes through proper investments.

They also provide estate planning with a number of advantages. These include: minimization of probate delays, expenses, and publicity; minimization or elimination of estate taxes; assurance of appropriate management of family assets; Assessment of the proper way of holding title to property; and post-death planning.

They also offer a number of other services. These include: regular review meetings with clients; implementation of investment and insurance plans; quarterly newsletters and relevant letters and/or articles to ensure that clients and prospects are properly informed. Meanwhile, it should be noted that The McDaniel Corporation has no proprietary investment products.

Their new website has a ?request a quote? page where people can make various kinds of requests. These include a general information request, a request for annuity quote, a request for long-term care insurance quote, and a request for life insurance quote.

They recommend that people use the general information request because there are a number of roadblocks to financial success, such as inappropriate investments, procrastination, and lack of goals. People?s ability to pursue their financial goals may depend on how well they are able to avoid these roadblocks.

Annuities are for achieving long-term financial goals like retirement and these earnings usually accumulate tax deferred. Long-term care insurance is essential for the needs of the elderly who require long-term care. Long-term care insurance will transfer a part of the risk of long-term care costs to an insurance company, thus protecting the insured and his or her family from possibly devastating long-term care expenses. And finally, life insurance is for protecting the dependents of the insured in the event of death. As long as it is properly positioned, life insurance can offer a steady stream of income for the dependents. It may also offer liquid capital for paying estate taxes and other obligations.

McDaniel Corp can help people with regards to their financial goals. They can provide assistance with mapping out and achieving the client?s financial goals after ensuring that they have a clear understanding of the client?s situation.

Those who are in need of the services of financial advisors in Columbia SC can check out the McDaniel Corp website, or contact them on the phone or through email. They are open from 9:00 am to 6:00 pm, from

Monday to Friday.

###

For more information about The McDaniel Corporation, contact the company here:The McDaniel CorporationCraig McDaniel803-750-4848cmcdaniel@mcdanielcorp.com6156 St. Andrews Road, Ste. 108Columbia, SC 29212

The McDaniel Corporation

The McDaniel Corporation has a professional staff of dedicated, experienced, knowledgeable and highly competent personnel who are trained and licensed to offer a broad range of financial services.

Website: https://www.mcdanielcorp.com/

Email: cmcdaniel@mcdanielcorp.com

Phone: 803-750-4848

THE McDANIEL CORPORATION

The Retirement Planning Specialists