



BEYOND
YOUR HAMMOCK

Boston Financial Planner Beyond Your Hammock Celebrates 11 Years of Expertise in Wealth Management

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Beyond Your Hammock, a financial planning and wealth management firm based in Boston, is celebrating its 11th anniversary in August 2024. The firm specializes in wealth management, financial planning, investment management, financial coaching, and financial reviews. Over the past decade, the company has supported business owners, professionals, and clients with complex financial needs.

Kali Roberge, a representative from Beyond Your Hammock, shared that, "Reaching this milestone is a testament to our commitment to guiding clients through their financial journeys. We pride ourselves on offering tailored financial advice that evolves with our clients' lives."

Founded with a mission to provide objective financial advice, Beyond Your Hammock operates on a fee-only basis. This means their guidance comes without any conflicts of interest, as they don't receive commissions or kickbacks from third parties. Their clients typically include couples in their 30s and 40s with substantial household incomes, business owners, and employees with intricate compensation structures.

For the past 11 years, Beyond Your Hammock has built a reputation as a reliable CFP in Boston. They create

customized financial strategies based on each client's individual goals and needs. Their approach covers everything from financial reviews to investment management, ensuring all aspects of clients' financial lives are considered.

Instead of relying solely on static documents, Beyond Your Hammock establishes ongoing relationships with clients. This allows them to adjust plans as life events occur, financial priorities shift, and long-term goals are refined. This flexible planning is key to helping clients navigate various stages of their financial lives, making necessary adjustments along the way.

Investment management is another core service offered. Using an empirical, evidence-based strategic investment management approach with their proven financial planning framework, Beyond Your Hammock helps clients build their assets and grow their net worth. This process aims to maximize financial potential, enabling clients to make the most of their hard work and investments.

The firm also places a strong emphasis on financial coaching. They take complex financial concepts and translate them into practical, actionable advice. This coaching helps clients achieve their unique visions and stay on course with their financial goals.

Financial reviews provide clients with a starting point to plan their financial future. These reviews are collaborative and involve clients in the process, ensuring a clear roadmap from their current situation to their future aspirations. This personalized approach aligns financial strategies with clients' needs and objectives.

Being recognized as a prominent Boston financial planner reflects Beyond Your Hammock's dedication to maintaining high standards in client service and financial advice. The firm focuses on serving clients who are proactive, good savers, and have intricate financial situations, showcasing their capability to handle complex financial landscapes efficiently.

"We look forward to continuing our journey with clients and helping them achieve financial success and stability over the next decade and beyond," Roberge added. The firm remains committed to offering impartial advice, ensuring clients receive the best possible guidance and support.

As Beyond Your Hammock celebrates its 11th anniversary, it reaffirms its role as a trusted partner in financial planning and wealth management in Boston. The future looks promising as the firm continues to adapt to meet the evolving needs of its clients.

For more information about Beyond Your Hammock and its services, visit their official website beyondyourhammock.com. To learn more about their role as a CFP in Boston or to explore services by this Boston financial planner, visit their website.

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Beyond Your Hammock

Beyond Your Hammock provides fee-only financial planning and wealth management designed for high-achieving professionals who want to enjoy life today while still planning responsibly for tomorrow.

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