

**FOLSE** FINANCIAL

INVESTMENT & RETIREMENT  
SERVICES

## **Folse Financial Investment & Retirement Services Emphasizes Comprehensive Four-Phase Approach to Retirement Planning**

*May 21, 2026*

BELLE CHASSE, LA - May 21, 2026 - PRESSADVANTAGE -

Folse Financial Investment & Retirement Services, a Louisiana-based investment and retirement services firm with 24 years of experience, continues to guide clients through comprehensive financial planning strategies designed to address each phase of their financial journey. The firm, led by Robert J. Folse, serves clients primarily in Gretna, Metairie, and Kenner, Louisiana, focusing on transforming complex financial information into actionable strategies tailored to individual client goals.

The company's four-phase approach to financial planning encompasses Saving and Accumulating, Growing and Protecting, Utilizing, and Sharing and Transitioning. This comprehensive methodology addresses the complete spectrum of financial needs individuals face throughout their lifetime, from initial wealth accumulation to leaving a legacy.

"Every client comes to us with unique financial circumstances and personal objectives," said Rob Folse, Lead Investment Advisor at Folse Financial Investment & Retirement Services. "Our role as a licensed advisor is to examine the complete picture of their financial situation and time horizons, then develop strategies that

align with their specific financial life stages and goals."

The Saving and Accumulation phase helps clients establish disciplined saving habits and create structured strategies for important life milestones. During the Growing and Protecting phase, the firm provides investment guidance aimed at wealth accumulation while implementing risk management strategies to safeguard assets. The Utilizing phase focuses on helping clients effectively leverage their accumulated wealth to meet current financial objectives and maintain their desired lifestyle. The final phase, Sharing and Transitioning, addresses legacy planning concerns, helping clients determine how their wealth will benefit family members or charitable organizations.

Folse Financial's approach distinguishes itself through its emphasis on translating complex financial concepts into understandable, client-centered strategies. This methodology has proven particularly valuable for clients navigating retirement planning decisions, investment allocation choices, and estate planning considerations.

"Advising clients should never be a one-size-fits-all proposition," added Folse. "We take pride in our ability to listen carefully to what matters most to each client, then craft personalized strategies that reflect their values and aspirations while addressing practical financial realities."

The firm operates as an independent financial advisory practice, offering securities and advisory services through LPL Financial, a Registered Investment Advisor and member of FINRA/SIPC. Folse Financial is registered to conduct securities business with residents of Louisiana, Mississippi, and Virginia.

Folse Financial Investment & Retirement Services has built its reputation over more than two decades by maintaining a client-focused approach that prioritizes long-term financial stability and goal achievement paired with individualized service. The firm's comprehensive four-phase methodology provides a structured framework for addressing the evolving financial needs that individuals encounter throughout different life stages, from early career planning through retirement and estate transition.

###

For more information about Folse Financial Investment & Retirement Services, contact the company here: Folse Financial Investment & Retirement Services  
Robert Folse  
504-442-3080  
folse.adrienne@designtheplanet.com  
8558 Hwy 23, Suite One  
Belle Chasse, LA 70037

## **Folse Financial Investment & Retirement Services**

*Focused on your future, Robert J. Folse and the team at Folse Financial provide expert investment and retirement*

*services in Louisiana. We craft personalized strategies to help you navigate every financial phase and leave a lasting legacy.*

Website: <https://www.folsefinancial.com/>

Email: [folse.adrienne@designtheplanet.com](mailto:folse.adrienne@designtheplanet.com)

Phone: 504-442-3080

