

# SIMPLIFYING

## Your Finances & *Your Life*

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Located a short distance from Hyde Park Square, Eichner Investment Planning is a boutique business dedicated to its clients. For nearly 11 years, Eichner Investment Planning has worked with a small number of families in order to provide a high level of customer service.

“We are deliberately a small because we want to deliver the highest level of service. We see ourselves as unique, sitting on the same side of the table as the client, as we do not peddle product,” says Alan Eichner, owner. “We are pretty selective with whom we work. It’s not just come in, and you’re a client – it has to make sense for both parties.”

Eichner Investment Planning works for the client as an independent advisory firm. It is not a money management firm, not a broker, and not an insurance representative. This allows Eichner Investment Planning to guide each client independently and in the client’s best interest.

Eichner Investment Planning works predominately, but not exclusively, with entrepreneurs age 55 and older. Typically, many people around that age are starting to realize they will live a long life but not forever. Stereotypically, the husband has a handle on the finances, while the wife has not had much involvement in the financial affairs. Continuity, in that sense, is having someone to help shepherd the family money as it passes to the wife and the children. As a result, Eichner Investment Planning brings continuity to the situation by getting each client’s spouse and children involved.

“We are the point person in our client’s financial life -- from estate planning to taxes and insurance,” says Eichner. “Unlike other firms that have advisors with a very large number of clients, since we have a small client base by design, we are able to actively go to meetings with the client and quarterback what is going on.”

The client is also assisted with their asset allocation. “At first, we bring everything down to one piece of paper, and we talk about the history, performance, and fees. Our goal is not to disrupt relationships” says Eichner. “For example, if you have money invested with your brother-in-law at *XYX* Brokerage Firm or *XYX* Money Manager, great, keep the account there, but let’s understand what he is doing performance-wise as well as what he is charging you.

Then we can help the client make an informed decision on whether or not to keep the account. We do not need to own the account to help clients make an informed decisions.”

We look at your personal situation from a broad perspective. Beyond understanding the performance of a client’s investments, Eichner Investment Planning helps the clients understand the tax implications of all decisions in their financial lives.

Importantly, the staff at Eichner Investment Planning is able to help make introductions between their clients and other service providers. “We help our clients address issues that are not just investment related,” says John Discepoli, a financial planner at Eichner Investment Planning. “Our clients appreciate it when we say, ‘We can recommend a firm that can help you with that situation.’ We try to help our clients with everything.”

At Eichner Investment Planning it is all about simplifying your finances and your life. ❖

Eichner Investment Planning, LLC is located in Rookwood Tower, 3805 Edwards Road, Suite 550, Cincinnati, OH 45209. You can reach them at 513.448.4024 or visit their website at [www.eichplan.com](http://www.eichplan.com).

