FREE Financial Planning Services Are Available for COVID-19 Frontline Workers Sign Up Here

Turning Point Financial
Clarity Ahead

Services
Overview
COMPASS Financial Planning
Investment Management
Insurance
Taxes and Accounting

Free Workshops

Client Login

Schedule a Consultation

Image placeholder

Find a Clear Path to Your Financial Goals

Whether you're saving for retirement, running a business, or just plain chasing a dream, you deserve to set your doubts aside and look forward to your future!

Schedule a Consultation

Get a Clear Picture of Your Finances

Gain Peace of Mind Through Financial Planning

Get Expert Support For the Path Ahead

Do you have doubts about your financial future?

Too many of us live in a constant, stressful state of unease about whether we're on the right path toward our financial goals. You shouldn't have to seek clarity about that on your own.

Welcome to Your Turning Point

Leave doubt behind and turn down the clear path to your financial goals.
Individual | Business

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Find Direction

Our COMPASS program gives you a clear picture of your finances and the plan for reaching your goals.

Icon/Image

Find Support

Our team provides all the support your plan needs for investment management, insurance, taxes, and accounting.

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Find Joy in the Journey

Let your doubts give way to excitement and enjoy the confidence that comes from knowing you're on the right path.

Schedule a Consultation

What Are Your Goals?

Is Our Family on the Right Path?

Melinda and Josh
Read Their Story

Is My Business Financially Strong?

Warren
Read His Story

Are We Ready for Retirement?

Doug and Karen
Read Their Story

Every Journey is Unique, and We Believe Yours is Worth Getting Excited About

For more than 25 years, we've helped hundreds of clients find financial clarity. Our team has decades of experience that they use to support you. However, what truly sets us apart are our values. We are truly excited to help you, and we are committed to the following:

Humility
We find more joy in giving than receiving.

Integrity
We do the right thing, even when it's hard.

Perseverance
Whatever it takes, we never give up.

Empathy
We seek to see things from your perspective.

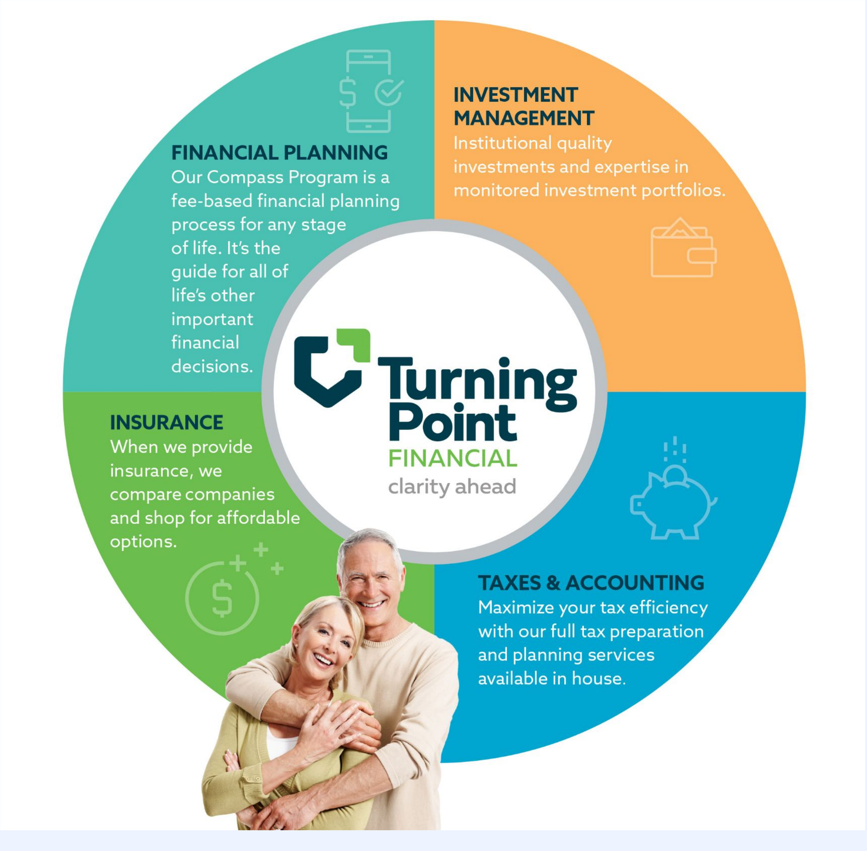
Drive
We work hard for your success.

Schedule a Consultation

Meet Our Team
More on Our Core Values

Services

Everything you need to find financial clarity and reach your goals is here.



Financial Planning

The **COMPASS Program** is the best place to start. This process reveals the clear path to your financial goals.

Financial Services

All of the services you need to support your goals are available here in one place.

- **Investment Management**
- **Taxes and Accounting**
- **Insurance Solutions**

Schedule a Consultation

There's **Clarity Ahead**. Here's How You Find It.

Icon/Image

1. **Discovery**

Schedule a consultation right away. This Discovery Meeting helps us get to know the facts, but more importantly it *lets us understand your unique story.*

Icon/Image

2. **Get a Financial Clarity Plan**

Whether you need individual services or the full **COMPASS Program** process, putting a plan together for you is something we absolutely love to do.

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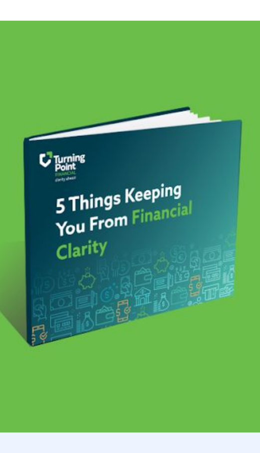
3. **Follow a Clear Path to Your Goals**

Your Turning Point is here! It's time to start your new financial journey, and we're excited to support you every step of the way.

Schedule a Consultation



5 Things Keeping You From Financial Clarity

Are you doing any of the 5 things?

Download this PDF to see if you can make some easy turning points to get you closer to achieving financial clarity.

DOWNLOAD FREE PDF

Turning Point Financial

Clarity Ahead

Most people have doubts about their financial future. We help you turn things around by showing you a clear path to your financial goals and providing the services you need to reach them, so you can look forward to the future with confidence. Read More

Schedule a Consultation

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Contact

Office: (301) 846-9336
Fax: (301) 732-5549
7210 Corporate Court,
Suite A
Frederick, MD 21703
info@tpfinancial.com

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