

Retirement Planning

Age Requirements

No Age Requirement

Intake Process

Call for more information and to request assistance.

Self Refer

Yes

Waddell Group

<https://www.waddellgroup.net>

<https://www.facebook.com/WaddellGroup/>

Main

(703) 881-9173

Toll-Free

(888) 312-9173

1953 Gallows Road, Suite 110

22182 VA

United States

Fee Structure

Call for Information

Payment Method(s)

Private Pay

Languages Spoken

English

The Waddell Group offers retirement planning that includes working with a financial advisor to map a comprehensive, thoughtful retirement strategy and keep it on track. Staff will review asset allocation, provide asset management, and offer institutional and private wealth creation and management, along with trust management services. Staff can help with insurance and annuity decisions, college planning, and estate planning.

Provides speakers for disability conferences, and public and private workshops for families and professionals.

Securities and investment advisory services are offered through Raymond James Financial Services Inc., a member of FINRA/SIPC.

Service Area(s)

Alexandria City

,

Arlington County

,

Fairfax City

,

Fairfax County

,

Falls Church City

,

Loudoun County

,

Manassas City

,

Manassas Park City

,

Prince William County

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