

Shoreline Hometown Credit Union Partners with Concurrent Financial Planning for Financial Advice Services to Members

This partnership provides Shoreline Hometown Credit Union members access to professional financial planning services to help them secure their financial future.

GREEN BAY, WI, UNITED STATES, February 14, 2024 /EINPresswire.com/ -- [Shoreline Hometown Credit Union](#) is excited to announce its partnership with [Concurrent Financial Planning](#), an award-winning financial planning firm. This partnership will allow Shoreline Hometown Credit Union to offer its members access to professional financial planning services, helping them achieve their financial goals and secure their future.

Concurrent Financial Planning is known for its expertise in providing personalized financial planning services to individuals and families. With this partnership, Shoreline Hometown Credit Union members will have access to a team of experienced financial planners who will work closely with them to create customized financial plans based on their unique needs and goals.

"We are thrilled to partner with Concurrent Financial Planning to provide our members with access to top-notch financial planning services," said Nathan Grossenbach, CEO and President of Shoreline Hometown Credit Union. "We understand the importance of financial planning and want to ensure that our members have the resources and support to make informed decisions about their finances. This partnership aligns perfectly with our mission to empower our members to achieve financial success."



Concurrent Financial Planning

Through this partnership, Shoreline Hometown Credit Union members will have access to a wide range of financial planning services, including retirement planning, investment management, tax planning, and more. Members can schedule consultations with Concurrent Financial Planning's team of experts at their convenience and receive personalized recommendations and guidance to help them reach their financial goals.

Concurrent CEO Dr. Preston Cherry says, "We find people have an ideal life they envision and desire trusted financial advice to instill confidence and clarity in their journey. Cherry continues, "Through this partnership, Concurrent Financial Planning will deliver Shoreline members measurable and meaningful advice that helps them maximize their lifestyle now, optimize their retirement future, and better understand what they value most."



Shoreline Hometown Credit Union and Concurrent Financial Planning are committed to helping members achieve financial stability and success. This partnership is a testament to their dedication to providing exceptional services and support to their members. Please visit Shoreline Hometown Credit Union's or Concurrent Financial Planning websites for more information about this partnership and the financial planning services available.

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We find people have an ideal aspirational life they want to achieve and desire trusted financial advice to instill confidence and clarity in their journey.”

Dr. Preston D. Cherry

For more information about Concurrent Financial Planning, visit www.concurrentfp.com. Follow us on Twitter and

Facebook @concurrentfp, Instagram @concurrentfinancial, and YouTube @LifeMoneyBalance.

About Concurrent Financial Planning:

Concurrent Financial Planning is a people-first financial advice firm that helps professionals and business owners reach their version of financial freedom with confidence. Serving clients virtually across the United States, we deliver advice through the [Life Money Balance](#)® philosophy, letting your life lead your money so they work concurrently to achieve your life's design.

About Shoreline Credit Union:

For over 80 years, Shoreline Hometown Credit Union has served as a member-owned, non-profit financial cooperative. With headquarters in Manitowoc County, Wisconsin, it has approximately 8,000 members in nine counties — Brown, Outagamie, Winnebago, Door, Calumet, Fond du Lac, Kewaunee, Manitowoc, and Sheboygan.

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