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EAST ALTON, IL, UNITED STATES, September 25, 2025 /EINPresswire.com/ -- Stephens Planning has announced the launch of its newly redesigned website, offering easier access to financial planning services and educational resources tailored to retirees and families. As part of this launch, the firm is now providing a complimentary Financial Viewpoint process, a guided planning experience designed to help community members assess and strengthen their overall financial health.

The Financial Viewpoint is more than a simple checklist — it is a structured, advisor-led process that examines over 50 elements of an individual's financial life, including areas such as financial development, investment strategy, lifestyle protection, and estate organization. The service is offered at no cost as part of Stephens Planning commitment to supporting financial clarity and long-term security within the community.

"The Financial Viewpoint gives people a safe, structured way to take stock of where they are," said Curtis Stephens, founder of Stephens Planning. "It's not about selling anything. It's about sitting down together and making sure nothing falls through the cracks."

Designed to be accessible and conversational, the process provides participants with a personalized analysis and actionable insights — regardless of whether they choose to engage in ongoing planning services. The firm reports that the process is especially helpful for retirees and pre-retirees who want to ensure they are not overlooking critical decisions involving taxes, income planning, insurance, or legacy concerns.

Stephens Planning, planning style is influenced by its founder's background in emergency response. Rather than focusing exclusively on portfolios, the firm emphasizes planning for life's uncertainties with the same calm, organized approach used in high-stakes crisis situations.

"Our job is to help people stay calm and focused, even when life feels chaotic," Stephens said. "This process helps them get everything on the table — and get ahead of potential problems."

Community members can schedule their complimentary session directly through the new Stephens Planning website.

About Stephens Planning

Stephens Planning provides personalized, values-based financial planning for business owners, retirees, and families seeking long-term clarity and peace of mind.

Advisory services are offered through Coppell Advisory Solutions, LLC, doing business as Fusion Investment Advisors. The firm is registered as an investment advisor with the SEC and only conducts business in states where it is properly registered or is excluded from registration requirements. Registration is not an endorsement of the firm by securities regulators and does not mean the advisor has achieved a specific level of skill or ability.

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