

Financial Advisor in Charlottesville

Age Requirements

18 and over

Family

No

Intake Process

Call ahead for information

Self Refer

Yes

Raymond James & Associates

<https://www.raymondjames.com>

<https://www.raymondjames.com/deanmasloff>

Main

(434) 951-9988

Toll-Free

(800) 982-3035

941 Glenwood Station Lane

Suite 201

22901 VA

United States

Payment Method(s)

Private Pay

Languages Spoken

English

Services include financial planning and investments (401(k), IRS, estate planning), investment banking, asset management, banking, insurance, taxes and estate planning, durable powers of attorney, and trust services (which include revocable living trusts, credit shelter trusts, irrevocable trusts, generation skipping trusts, QTIP trusts, minor's trusts, charitable remainder trusts).

Specializes in serving the needs of retired clients and clients nearing retirement. Works closely with client's other trusted advisors such as estate attorneys, CPAs, etc. so the entire picture of a client's financial situation is understood.

Financial advisor who works with individuals with memory loss and caregivers.

Other offices located in Arlington, Springfield, Fairfax Vienna and McLean, Virginia.

Service Area(s)

Albemarle County

,

Charlottesville City