



Josh Scandlen has provided financial advice since 1998 in areas of investment management, Social Security, tax, retirement planning and wealth transfer strategies.

Josh believes that complexity is the enemy of successful financial planning.

Praise for Strategic Money Planning

“Beginning with prudent advice on debt and debt management and concluding with reasons for estate planning at an early age, Scandlen provides simple yet applicable strategies for anyone to use confidently – and secure a more stable financial future.

About as real and raw as it comes.”

Caryn Rodriguez, Littleton, Colorado

Strategic Money Planning is available at www.heritagewealthplanning.com, or by emailing Josh@heritagewealthplanning.com.

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Josh Scandlen, CFP[®], MS

Strategic Money Planning



8 easy ways to put your house in order