Why Clients Choose Us

THE OHMAN/MCCORMICK RETIREMENT GROUP OF RAYMOND JAMES®

The Ohman/McCormick Retirement Group is a Michigan-based financial advisory practice serving a select group of individuals, families and businesses in the mid-west and around the country. Our mission is to be a trusted advisor to our clients by developing and implementing a simple, straightforward, and personalized strategy to help them reach their financial objectives. Our commitment to clients is defined by three core principles:

I. Consultative Approach

- Through conversation and discovery, we understand your financial values and your goals
- Interactive wealth management framework helps clients visualize where they are today along with clear, tailored recommendations
- A commitment to educating clients to help them make incremental, smart decisions

Benefit: Clients can feel the confidence that comes from having more structure and clarity in their financial lives

II. Comprehensive Solutions

- The ability to work with other professionals allows for full plan integration and eases worry
- A clear and understandable investment philosophy combined with sound investment principles focused on goal-based outcomes
- Experience, teamwork, and a commitment to ongoing education help us innovate and add perspective

Benefit: Clients feel comfortable knowing that all of their financial planning needs are being met with an advisor acting in their best interest

III. Lasting Relationships

- Working with a select number of clients helps ensure accessibility and responsiveness
- Proactive, ongoing communication helps clients understand their situation at all times, enabling us to anticipate, prepare, and act
- Taking the time to fully immerse ourselves in our clients' lives build comfort and trust

Benefit: Clients feel more connected and informed, which can lead to peace of mind