

McCabe & Associates: What is your dream?

By PATRICE FISHER
STAFF WRITER

NEW BRITAIN — “You are not just another face in the crowd” to the people at James McCabe & Associates, Ameriprise Financial, located at 329 Main St., Portland.

“We work with clients collaboratively to meet their goals prospectively through financial planning and providing sound financial advice” states, James McCabe, owner

McCabe, who has owned and operated the business for over 28 years, thinks that the key to his success is building personal relationships with his clients.

“We are concerned about their family — send get well cards, attend funerals and ask them how their grand-kids are doing — building long-term friendships,” He says.

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JAMES MCCABE
Owner, James McCabe & Associates, Ameriprise Financial

client with a baseline look at their situation and if they can reach their goals. Our detailed financial advice provides our clients a look at where they are today and how to they can reach their goals tomorrow” McCabe says.

Financial evaluations are by appointment and potential clients are required to bring in their latest tax statement, copies of their financial documents and insurance costs, and income (expenses).

McCabe also explains that, upon the first appointment, he or one of his other advisers starts with the most

important question of all: “What is your dream?,” simply because the company integrates three valuable tools, dream, plan and track progress. It’s a method that McCabe feels provides the best service.

Furthermore, he explains that it can take “two to three visits before we are able to give each financial situation a complete assessment” and that varies “based on each client’s financial need.”

The company is also willing to provide clients with free advice on anything relating to car buying — how much to pay and affordability and how

to save money on things like insurance. He believes that by doing this he creates even more dependable service.

The franchise serves New Britain, Plainville, Newington and Berlin, and has 11 staff members, nine of whom are financial advisers.

McCabe thinks that what keeps his associates up-to-date is continued education, saying that “each adviser is required by state and federal law to recertify every two years with education credits as well as completing an ethics course.”

“We are fiduciaries and are always acting on the

best interests of our clients,” McCabe says.

He and his associates facilitate this by tailoring financial plans and providing the best financial advice at a fair cost. Providing accurate and sound solutions, including risks, benefits, and costs based on need.

They possess the capabilities and resources to provide customized recommendations and support for tax, estate, and retirement planning.

With over 28 years of dedicated service to providing clients with security and trust, James McCabe & Associates make it their personal goal to help their clients reach theirs.

For more information or schedule an appointment with James McCabe & Associates at Ameriprise Financial, call 860-342-1756 or go to www.ameripriseadvisors.com/james.j.mccabe.

Office hours are Monday through Friday from 9 a.m. to 5 p.m. or by appointment.

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