

Allegiant Financial Services Group



LISA CASSIDY

Financial Planner



LISA@ALLEGIANTFSG.COM



844-299-1501 EXT. 808

Contact Us.

Meet with us at one of our multiple office locations
Email or call to schedule your appointment.

Allegiant Financial Services Group

Toll Free: 844-299-1501

Hours

Mon: 08:00 am – 06:00 pm
Tue: 08:00 am – 06:00 pm
Wed: 08:00 am – 06:00 pm
Thu: 08:00 am – 06:00 pm
Fri: 08:00 am – 06:00 pm
Sat: By Appointment
Sun: Closed

Meet Lisa Cassidy

When life happens, the only way through is together.

Your finances are driven by moments.

Those inevitable moments that you work hard to prepare for and a lot more moments that you never saw coming.

The only thing in life that is certain, is that life happens to us all. And, although it may feel overwhelming – know that you are not alone.

I'm Lisa Cassidy – a professional financial planner and fiduciary dedicated to serving you. As a financial fiduciary, everything I do is done with you and in your best interest – not mine. Not only am I legally bound to act in your best interest-- I'm honored to. And because I'm like you, I've experienced life's ups and downs too. I know the value of leaning into a supportive community to help navigate life's inevitable moments.

I'm privileged to be a part of yours.

Whether you are on the path to retirement, a business owner advocating for your team, or a federal employee navigating your benefits, know that I've got your back.

Areas of Expertise

For those seeking to retire

Work with me to develop a **comprehensive financial plan**. A plan that covers all your needs.

For those running a business

Work with me to create a **401(k) Employer Plan** and a personal **comprehensive financial plan**.

For those working for the federal government

Work with me to kickstart your **retirement benefits** and to develop an **income plan** that supports your lifestyle through all of life's moments.

- + Wealth Management
- + Retirement Planning
- + Income Planning
- + Life Insurance
- + Long Term Care
- + Asset Protection
- + Tax Saving Strategies
- + Estate Planning
- + 401(k) Employer Plans
- + Federal Employee Retirement System (FERS)