Who we help

Proactive working couples, 15-25 years from retirement work with me to put their financial lives in order, relieve financial stress and create a path for retirement and their kids' education.

These folks, overwhelmed with money choices and exhausted from work and school activities, contact us when they wonder…

Add family in silhouette photo

Do I save for retirement or my child's education?

Is a 529 plan right for me?

Where should I go when I get a letter from the IRS?

How should I invest my 401K?

Am I confident I am making the best decisions for my future?

What am I going to do in retirement?

How can I financially fulfill my dreams?

Can I worry less about money and enjoy life?

Wallace Larson retired from the Army at age 44 with a young child. He experienced and understands many of the questions and emotions that come up on the journey to retirement. He can help you with your questions and concerns.

Contact us today for a free consultation.

How we help

Subpage: What can I expect?

Photo: Use Gray Maize Photo.

The process of working with a financial advisor is much like dating. Essential Financial Strategies wants you to be confident, making the best decisions for your future and family. There is an initial period that both you and the advisor need get to know each other. Money can be very intimate topic for some and something that folks are rightfully cautious with whom they choose to divulge their financial lives.

Normally after an email exchange, meeting with Essential Financial Strategies starts with brief phone call so that you and Wallace become a bit acquainted and see if there is an initial fit. During the phone call a complementary Get Acquainted Meeting is scheduled

During this in person meeting Wallace will learn more about you and your needs. He will review your finances and taxes.

A follow-up free meeting is held a couple of weeks later to discuss the specifics of how Essential Financial Strategies can help you.

Contact us today to get started.

About Us

Wallace Larson founded Essential Financial Strategies to help couples tame their retirement money worries.

Struggles with money worries are not new as I faced them prior to my retirement from the Army. Not trusting the advisors available overseas, I proactively set about researching and studying to reduce my retirement financial stresses. In the process, I developed a passion for helping people with similar retirement worries. Affiliated with the Alliance of Cambridge Advisors (ACA), I now help people tame their retirement worries and obtain financial independence. Wallace works with proactive couples, often with school aged children that want to build a path to retirement and financial independence.

In my studies, I earned an **MBA** with a specialization in Financial Planning. I passed the gold star **Certified Financial Planner(R)** exam and am a candidate for the Certified Financial Planner (R) designation. Additionally, I passed a rigorous three part exam process and am admitted to practice before the IRS as an **Enrolled Agent**.

In my spare time I enjoy exercise, public speaking with Orland Park Toastmasters and the Chicago Southland Speakers Bureau and am active in multiple roles at church. My most important life role is as a husband and father to his young son.