NEWS

FOR IMMEDIATE RELEASE

CONTACT:
Colin Swift
Impact Communications, Inc.
913-649-5009
ColinSwift@ImpactCommunications.org

Financial Independence Planning, LLC Celebrates 30 Years of Excellence in Financial Services

Founder Harry Keller credits "Client-Centered Financial Guidance and Lifelong Trusted Relationships" to the firm's success and longevity

Conshohocken, PA [February 12, 2025] – Financial Independence Planning, LLC (FIP), a leading financial planning firm providing comprehensive wealth management services for clients of all financial backgrounds, has reached a new milestone. To mark its 30th anniversary, the firm is launching a yearlong celebration to recognize the strong foundation it's built and the hundreds of families the firm proudly serves.

Founded in 1995 by Harry Keller, CEO and Senior Financial Advisor, FIP emerged when total financial planning was still an evolving concept. Keller envisioned a firm built on trust, education, and a holistic approach to wealth management. From humble beginnings in his townhouse basement, Keller partnered with local Chambers of Commerce, offering retirement classes to the community and complimentary financial plans. Keller's vision quickly gained momentum, and three decades later, FIP has grown into a 15,000-square-foot headquarters, a team of 26 dedicated professionals, and a client base of over 830 households and as of 01/2025, Financial Independence Planning, LLC has over $700 million in assets under administration through Cetera Advisor Networks LLC. Despite this growth, the firm remains true to its core mission: delivering personalized, strategic financial guidance that empowers clients to make informed decisions for their future so they can, Worry Less and Enjoy Life More.

"We are incredibly grateful for the trust our clients have placed in us over the last 30 years," said Jared Keller, President at FIP and Senior Financial Advisor, "This anniversary is not just about looking back at our achievements but also about reinforcing our commitment to the future—both for our clients and our community."

At the heart of FIP's success is the Financial Independence Planning Process®—a unique 8-step approach that ensures clients receive regular financial check-ins, keeping their plans aligned with their goals while building deep, lasting relationships. Leveraging cutting-edge technology, FIP utilizes advanced software that provides a comprehensive view of a client's entire financial household, projecting their financial trajectory through every stage of life. This holistic approach provides each client with a personalized strategy tailored to their unique financial goals, offering greater confidence and peace of mind.

A YEAR TO CELEBRATE

As part of its 30th-anniversary celebration, FIP will host special client appreciation events, educational workshops, and community initiatives throughout the year to continue its tradition of excellence while embracing new opportunities to serve and educate the next generation of investors. The firm will also head a year-long charity campaign of fundraising and awareness with Manna on Main Street, a local nonprofit committed to ending hunger in the North Penn region by providing food, fulfilling social service and education needs, and conducting community outreach.

Yearlong celebration plans include:

- Reflective blog posts from Harry Keller and Jared Keller
- Commemorative video interviews highlighting the entire FIP team
- Commemorative video highlighting the founding and story of FIP
- Family-Focused client appreciation day in June
- Client night event celebrating current and past clients, partners, and team members
- A special team celebration in December

Find a complete list of events and details here.

ABOUT FINANCIAL INDEPENDENCE PLANNING

Financial Independence Planning, LLC (FIP), based in Conshohocken and Lansdale, is a full-service financial services firm serving Pennsylvania's greater tri-state area and clients in 43 states. FIP has a team of experienced advisors and dedicated professionals who support clients in key areas, including investment management, income and asset protection, tax strategies, estate planning, business succession planning, elder care planning, special needs planning, charitable giving, and more. For over 30 years, the firm has executed the proprietary, eight-step FIP Financial Process to help its clients Worry Less & Enjoy Life More. FIP advisors ensure every client has a well-structured financial plan powered by top-tier software and ongoing monitoring, with regular reviews throughout the year—helping clients stay on track toward their long-term goals so they can focus on what matters most.
The firm's online client collaboration tools provide clients with 24/7 secure access and a 360-degree view of their portfolio through MyFIP. Harry and Jared Keller – both well-versed in matters related to personal financial planning and investment management – are available for interviews with press members. Learn more about Financial Independence Planning at www.MyFIPAdvisor.com.