THE TEAM APPROACH:

A dynamic father-daughter duo, Carol Dixon, CFP® and Michael Dixon, CPA/PFS, have created a unique, team oriented financial planning and wealth management practice, to implement holistic planning services to all clients.

From investment planning and budgeting, to estate and tax planning for individuals and families, the YPP team creates original, comprehensive planning solutions for all aspects of life. We work closely with our clients at all stages in their life, creating a financial plan based on personal objectives, values and financial goals in order to protect, preserve, and grow their wealth.

The YPP Mission:

YPP, LLC works to create a unique, team oriented financial planning practice, to implement holistic planning services to all clients.

Some of our services:

- Investment Management
- Estate Planning
- Tax Planning
- Insurance Oversight
- Cash Flow Planning
- Retirement Planning
- Legacy Planning
- Holistic Financial Plans

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Carol A. Dixon, CFP®

Carol is a CERTIFIED FINANCIAL PLANNER (TM), Managing Member, and the Chief Executive Officer at Your Planning Partners, LLC. Carol has established an expertise in creating original planning solutions for individuals, families, and professionals during her years as a financial advisor.

Focused on a team approach, Carol has built a team of professionals to encompass all aspects of financial planning. A firm believer that you cannot be an expert in everything, Carol brings the best professionals to each financial planning engagement to create the most successful plan for every client.

Believing that education is an essential focal point of every plan, Carol is an advocate of empowering and assisting women in creating their own successful financial future. She is a member and supporter of The Foundation for Women’s Cultural and Economic Literacy, as well as a supporter of The Center for Family Services, and the Girls Scouts of Southeast Florida.

Carol is a graduate of the University of Notre Dame, where she earned her BA in Entrepreneurship and Management. In 2006, Carol joined small independent firm and rose to Director of Operations in just three years. In 2016, Carol, with her father Michael Dixon, created Your Planning Partners, LLC to focus on holistic planning services.

Michael J. Dixon, CPA/PFS

Michael is presently a Financial Advisor at Your Planning Partners, LLC. Michael’s expertise is in providing the highest level of advisory services and planning solutions to meet the financial challenges of affluent individuals. He brings accounting and tax, financial advisory planning and extensive wealth management experience to every client engagement.

Michael works closely with clients, especially those who are in a transition period in their life due to the loss of a spouse through death or divorce. He assists them in creating a financial plan based on personal objectives, values and financial goals in order to protect, preserve, and grow their wealth. Taking a holistic approach to planning and wealth management, Michael seeks to coordinate high net-worth individuals’ needs over their lifetime and considering the needs of their families.

For many of his clients Michael serves as a personal CFO, managing all of their financial activities. As a single source financial advocate, he works collaboratively with a client’s other professionals to create a focused, vertically integrated strategy that drives all present and future financial related decision making. Michael strives to provide clients with comprehensive planning advice, continuously, as the economic environment and their personal circumstances change.