



Your Planning Partners, LLC
Beyond Investing



THE TEAM APPROACH:

Beginning as a dynamic father-daughter duo, Carol Dixon, CFP® and Michael Dixon, CPA/PFS, created a unique, team oriented financial planning and wealth management practice, to implement holistic planning services to all clients. While the practice has since expanded beyond just Carol and Michael, their values of collaboration, innovation, and always putting the client first, are the core of YPP, LLC.

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

YOUR PLANNING PARTNERS, LLC

PO Box 31088
Palm Beach Gardens,
FL 33410

561-301-0008

www.yppllc.com

MEET THE TEAM

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.



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 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 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.



Kevin DeRosa, CRPC®

Kevin is a Para Planner at Your Planning Partners, LLC and is licensed as a Chartered Retirement Planning Counselor while he actively pursues the CFP designation. Kevin is the newest addition to the team at YPP as he transitioned to us in September 2020 after spending his first 3+ years as a financial advisor. He brings a passion for understanding what is most important to clients while helping them plan for how to reach their financial goals most effectively.

Kevin is a 2017 graduate from Gettysburg College with a BA degree in Economics and Spanish. He was a 4-year starter on the Gettysburg tennis team and is active in the tennis community in the Philadelphia area. Kevin is a certified tennis professional who enjoys both playing and teaching tennis in his free time. In addition to playing tennis, Kevin enjoys spending time with his friends and family, traveling, attending sporting events, and drinking wine.

