

Financial Planning

Age Requirements

No Age Requirement

Intake Contact

Daniel Kuper

Intake Contact Email

dkuper@financialguide.com

Intake Process

Please call to schedule an appointment to go over services.

Intake Contact Telephone

(703) 218-6710

Report Problems

Call the Agency

Residency Requirements

Virginia, Maryland, D.C.

Self Refer

Yes

Opta Financial

<http://www.optafinancial.com/>

Main

(703) 218-6710

3975 Fair Ridge

Suite 315N

20170 VA

United States

Monday: 8:00 am-9:00 pm

Tuesday: 8:00 am-9:00 pm

Wednesday: 8:00 am-9:00 pm

Thursday: 8:00 am-9:00 pm

Friday: 8:00 am-9:00 pm

Saturday: Closed

Sunday: Closed

Additional Availability Comments

Saturday and Sunday by appointment

Fee Structure

Call for Information

Languages Spoken

English

Opta Financial offers holistic financial planning services through a network of professionals experienced in retirement, estate, and long-term care planning. Services are offered for seniors and their families. Some assistance in planning includes the fields of:

- 529 college savings plan
- annuities
- disability income insurance
- retirement account
- investments
- life insurance
- mutual funds
- trust funds
- long-term care

Service Area(s)

Arlington County

,

Fairfax City

,

Fairfax County

,

Fauquier County

,

Prince William County

,

Stafford County