

Who Can Benefit from Wealth Management Services?



A Self-Employed Individual or Businesses with no Retirement Plan Contributions

If you are self-employed (with income) and have no retirement plan contribution, we can help determine what type of plan would be most beneficial and as well as help with the investments. This would also apply to a business that has no retirement plan in place.



Sending Children to College

If you have children, grandchildren, nieces, or nephews and want to know more about saving for college and investment opportunities such as 529 plans, we can help you choose and manage your options.



A Major Life Event that Generated Cash

Selling a business, gaining an inheritance, receiving a lawsuit settlement, or any life changing event resulting in an increase in cash - is the perfect time to consult with us regarding how best to structure and manage your investments. It is especially important to learn more about this service if you have not previously had a relationship with a broker.



Multiple Brokerage Accounts

If you have multiple brokerage accounts, especially if they are with different brokers, you may not be taking full advantage of services and investing strategies available to you. We can help you better structure your investments to achieve their financial goals.



Interest Income

If you have over \$50 of taxable interest income, especially with no dividend income, you are probably invested in money market accounts and certificates of deposit. These investments are currently earning anywhere from .35% - 2.75%. A fully developed financial plan could strategically place you to earn more money while not compromising the security of your investment.