

Who Can Benefit from Wealth Management Services?



A Self Employed Individual or Business with no Retirement Plan

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 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 a 520 plan, we can help you choose a plan and manage your options.



A Major Life Event that Generated Cash

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



Multiple Brokerage Accounts

If you have multiple brokerage accounts, especially if the 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 pursue your 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.