WEST · VOLUSIA

Wealth Mgmt.

"A Different Approach" GROUP, PA

Certified Retirement Counselors®

- Menu of "pay for services" options available for a customized experience
- Professional financial counseling sessions
- Fiduciary services available
- Consulting and evaluation of risk management
- Partnering with Attorneys and CPA's
- Develop a customized client investment Policy statement
- Risk profile evaluation
- Identify investment objectives and risk tolerances
- Review and discussion on estate planning needs
- Develop formal investment plan including setting goals and recommending portfolio structure designed for your specific needs and objectives
- Ongoing monitoring of specific goals and objectives and implementation of any necessary plan changes
- Comprehensive account aggregation for your family's entire financial life
- Independent and objective review of products and services in the marketplace
- Review and analysis of existing investments
- Review of your tax return
- Advice and analysis of all aspects of your financial life including major purchases, retirement plans, college plans, estate plans and any other investment programs
- Exclusive access to institutional investment programs not available directly to most individual investors
- Active management of taxes in any non-qualified investment account
- Close monitoring and control over investment costs
- Remain in touch and available
- Timely response to any questions or concerns you have regarding investment portfolios or financial matters
- Fees aligned with a comprehensive wealth management offering with absolutely no proprietary products or sales quotas.
- Cash flow prioritization needs analysis
- Independent review with a Comprehensive Insurance needs analysis for all types of insurance
- Ability to provide the same level comprehensive solutions to friends, family and business associates.

Highly Personalized Gold Key List of Services

www.westvolusiawealth.com