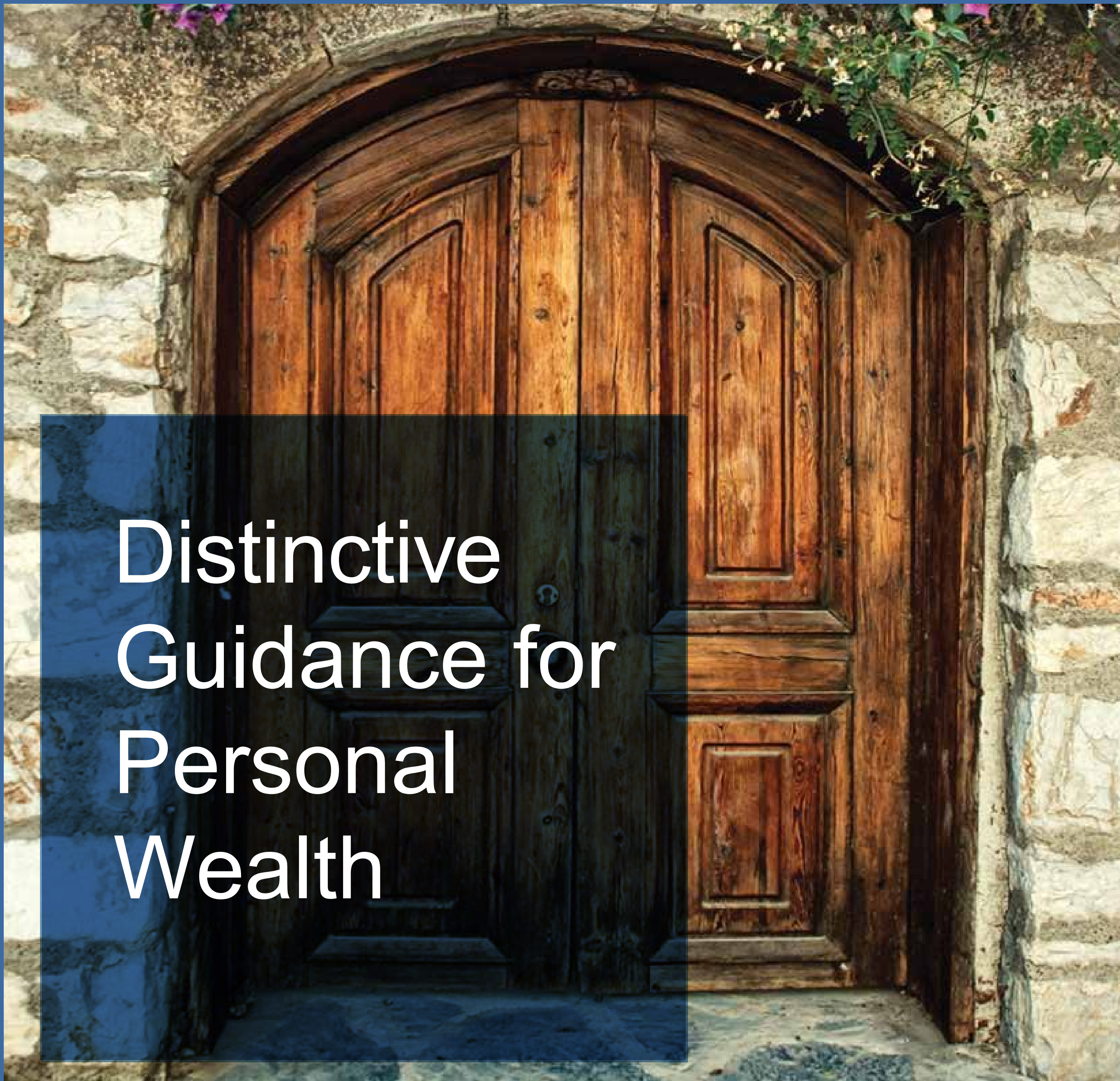


Distinctive Guidance for Personal Wealth

PALTZER
WEALTH MANAGEMENT

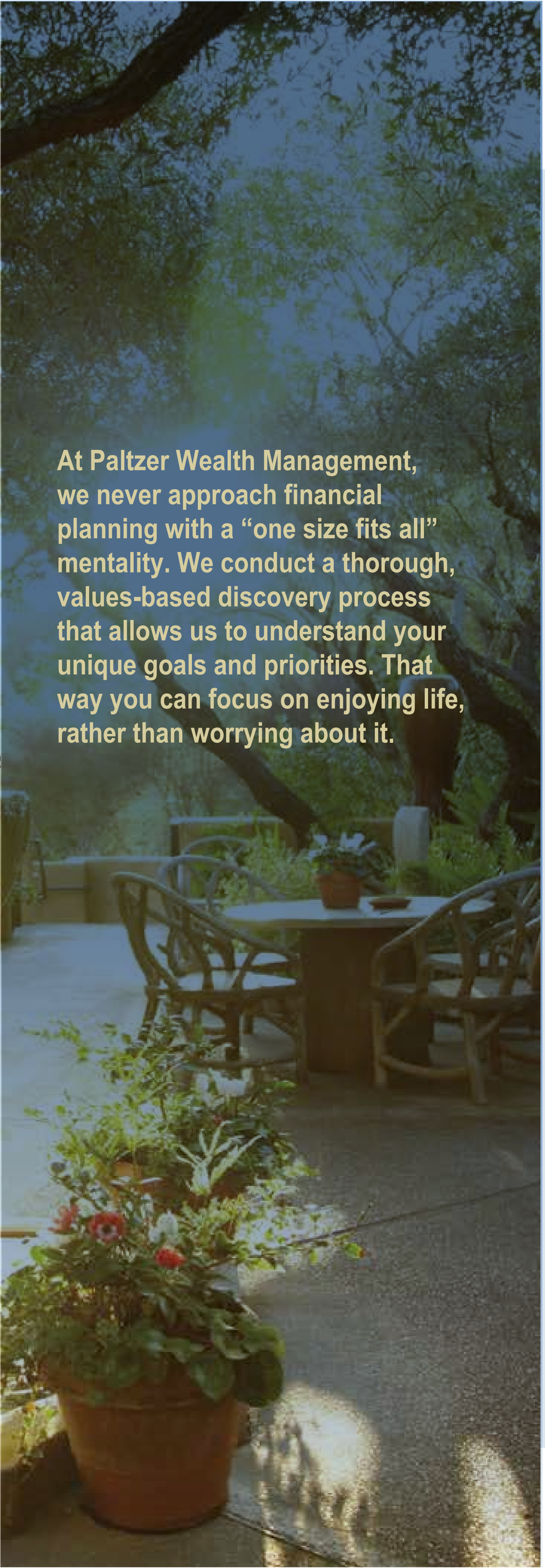
Your vision. Our guidance.

Life is made up of a series of steps you take in order to bring you closer to your ideal goals. You work hard and save responsibly, but there comes a point when you wonder if you are making the right financial choices to successfully achieve your long term dreams. This is why we are here. At Paltzer Wealth Management, we work side by side with you to map your unique goals and knowledgably guide you through your journey. Our clients believe in us, because we believe in them. Our mission is to inspire our clients to envision their lives and live their vision through education, communication, and services that exceed expectations. By sharing where you want to go, Paltzer Wealth Management will use our knowledge to guide you.

Our expectation is the same as yours: to be there for you when you need it.

With personal wealth comes great opportunity, as well as a complexity of choices, especially with respect to whom you entrust to share your financial and personal aspirations. While maintaining and growing your assests is critical, equally important is having the freedom to pursue what is important to you along the way. At Paltzer Wealth Management, we listen and strategically plan for your individual objectives and milestones during every stage of life.

Our team takes pride in empowering our clients through clear advice, prompt and consistent communication, and personal integrity. This is why great emphasis is placed on fostering a trusted relationship that encourages an open exchange of ideas and shared concerns. We are easily accessible whenever you need to discuss your ongoing porfolio performance. We will proactively reach out to you whenever opportunities arise, striving to add growth while preserving your wealth. We don’t just wait for solutions to present temselves, we go out and find them.



At Paltzer Wealth Management, we never approach financial planning with a “one size fits all” mentality. We conduct a thorough, values-based discovery process that allows us to understand your unique goals and priorities. That way you can focus on enjoying life, rather than worrying about it.

A well-rounded approach to financial planning.

At Paltzer Wealth Management, we take great pride in our distinguished philosophies. By placing an emphasis on confidentiality, open communication, ability to consult with other professionals in our field, and encouraging clients to reduce their overall debt; we offer a truly comprehensive approach to financial planning. Pursuing your long term goals is not simply about investing your financial resources - it’s about investing in your future.

We specialize in creating comprehensive strategies that address complex wealth management issues, such as managing tax implications, so that you can effectively control the destination and purpose of your wealth. We anticipate issues proactively, strategize for best results, and above all, are ever present and committed to your success. We have an understanding of the myriad of opportunities available to you, as well as the complex challenges you face. We recommend only those strategies we believe align with your future goals and aspirations.

Our services include:

- Investment Management
- Comprehensive Financial Planning
- Risk Management
- Business Retirement Plans

Use our independence to your advantage.

Planning for your financial future is one of the most important things you will ever do, so having access to resources and experienced advice from a trusted partner is invaluable. As an independent firm, Paltzer Wealth Management is positioned to cater to your distinct financial needs. We have the flexibility to offer access to a wide range of
non-proprietary products and services, which means you receive objective financial guidance and an assurance that your best interests always come first. Additionally, we are supported by the resources of LPL Financial, a nationally recognized and respected company. This gives our clients the perfect combination of personal financial planning services.

Paltzer Wealth Management
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PALTZER
WEALTH MANAGEMENT

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