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Provo Wealth Management Group:
A Hands-On Approach to Financial Guidance – Changing the Status Quo

SHREWSBURY, MA

Provo Wealth Management Group

Address: 385 South Street, Shrewsbury, MA 01545

Phone: 508-842-0539

Fax: 508-842-0571

Website: www.ProvoWealth.com

Product or Service: Team approach to wealth management and all types of financial services for individuals, families, corporations and non-profit organizations

Number of Employees: 6

Number of Advisors: 11

Head of Company: Christopher P. Provo, RFC, CRPC, President/CEO

Year Founded: 1992

**Provo Financial Services, Inc. voted best Financial Planning/Investment Services firm in Central Massachusetts based on the Worcester Business Journal online polling.*

At Provo Wealth Management Group, it's all about the client and creating a meaningful life. The firm's mission is to make all clients feel as though they are the only client. Since 1992, the seasoned wealth management team at Provo has nurtured relationships, provided exceptional specialized service, educated and advocated for clients. Committed to delivering custom-tailored, unbiased advice, Provo Wealth Management Group adheres to a philosophy of trust, accountability and client-centric practices.

Unlike many other firms, Provo is dedicated to partnering with fewer clients so they can better focus on client needs. "This approach affords our team – advisors and staff alike – the energy and time needed to provide quality service and attention to even the smallest details," says President/CEO Christopher Provo. "We seek to know our clients on a deep level, recognize what is most important to them and discover what they are passionate about. Only by truly understanding can we put clients on the right path."

The team at Provo utilizes a five-step process to create a personalized financial plan that answers the question: "What's appropriate for me and my family?" The dynamic problem solvers and critical thinkers at the firm identify your goals and objectives; select investments and strategies designed specifically for you; pinpoint trends using leading-edge research; monitor and manage in an effort to optimize performance; and navigate opportunities and pitfalls. Overall, bringing clarity to a complex world.

Provo Wealth Management Group provides prudent guidance on all aspects of financial management for a range of clients from families and widows to corporations and foundations. Their services include Wealth Management; the Retirement Red Zone; Alternative Investments; Insurance Planning and Asset Preservation Strategies; Family Office Services; Corporate Benefits for Partners, Executives, and Employees; Tax Planning Strategies; and College Planning.

Additionally, Provo Wealth Management Group's Certified Divorce Financial Analyst works with attorneys, mediators and individuals undergoing the divorce process to help them make sound judgments at a time when emotions typically are running high.

With access to sophisticated financial strategies and investment programs, Provo's team provides diversification and opportunities aimed at increasing the potential for investment returns, while seeking to minimize risk. Non-profit organization clients have their endowments evaluated and align their investment options with their mission – a key step, important to donors, often overlooked due to the vast holdings inside their endowments portfolio.

Accessibility to the advisors is key; Provo has its own free mobile app on Android and iPhone. On ProvoWealth.com clients can sign up to receive a free Weekly Market Commentary email featuring advice and educational resources.

Innovative in their field, Provo Wealth Management Group promotes sustainability as it applies to the way wealth is managed. Not all wealth is captured on a balance sheet; employees, consumers, shareholders and the environment feel the social impact from investments. Provo offers guidance on corporate social responsibility tactics and creates environmental stewardship programs. For instance, the firm works with human resource departments to nurture talent and optimize skill sets, blend culture gaps to deal with generation gaps, devise employee engagement strategies and create retirement, wellness and other benefits plans. The firm also helps business clients understand the new sustainability standards as set by GRI and the mission of the Sustainability Accounting Standards Board (SASB).

Although the firm has clients in 30 states, it focuses on the local community. The team is involved in many local non-profit organizations, including Becker College, 15-40.org, Seven Hills Foundation and the UMass Medicine Cancer Walk. Recipient of the Best of Business (BOB) Award in 2014 and 2015,* Provo Wealth Management Group vows to continue offering outstanding, customized services to all its clients.

"We believe that wealth management is not only about where your money should go," says Provo. "But also where your money can take you."