

THE TAILORED APPROACH

Wealth Strategies that Fit



Everyone wants something different from their retirement. And cookie-cutter financial plans and wealth management strategies that push one-size-fits-all approaches can fall short of savers' expectations.

What investors need instead is a customized approach that fits their life goals. "I generally start with the end in mind and reverse-engineer the plan to pursue the client's goal," said Angelo Anello, CRPS®, founder of Tailored Wealth Management. "That's why each plan is really tailored to each clients' needs."

Tailored Wealth Management, based in Newton, Massachusetts, provides wealth management, retirement planning, and insurance services to clients ready to take charge of their financial future. The firm also assists clients in articulating their estate planning needs and locating the right specialists to assist. The firm – which uses LPL Financial as its custodian – does not require a minimum asset level from prospective clients, but Anello looks for investors ready to clearly lay out their goals and work towards a future that works for them.

"I'm in the business of problem solving ... I act as the CFO in the relationship, and the client is the CEO. My job

is really to educate them, and provide them with multiple strategies to choose from" Anello told "Advisors Magazine" during a recent interview, adding that clients need to be empowered to make decisions.

Tailored Wealth Management, founded by Anello nine years ago, prides itself in taking each client's individual situation into account, and developing a personalized financial plan. Anello grew up with an understanding of how hard money can be to come by, and the value of personalized service from his father, a master tailor.

"My father was a master tailor, and came to the United States to pursue the American Dream. Even though my parents didn't attend high school in Italy, education was something that they really valued. My sisters and I worked hard and understood the value of a dollar. Acting with integrity was a value that was always stressed." Anello said. "When I did decide to go independent with LPL, I decided to name my firm Tailored Wealth Management as an homage



to my father."

The tailored approach often is lacking in today's technology-centric wealth management industry. New tools—the so-called "robo-advisors"—may provide value for savvy investors or savers in certain situations, but the technology remains limited and cannot provide customized advice when markets take a turn for the worse. A human advisor, meanwhile, can apply the brakes to an investor who lets the daily chaos of financial headlines and market swings influence their decision-making.

"I don't think savvy clients would work with a robo-lawyer for important legal matters," Anello said. "If it's important enough then it's best to work with an actual advisor."

At Tailored Wealth Management, clients will get the human touch an "actual advisor" can provide. And that means no complex jargon, no questions that are off-limits, and an advisor who will take the time to help clients develop, articulate, and plan to pursue their financial goals. Planning for retirement deliberately and with attention to detail is key, and Tailored Wealth Management works with clients to help them every step of the way.

"Investing for retirement is serious business," Anello said. "It's not a dress rehearsal and it's important we get it right the first time."

For more information, visit: tailored-wealthmanagement.com



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