Media Contact
Kevin Dinino, KCD PR
619-955-7759
Kevin@kcdpr.com

About Marvin Wealth Management

Marvin Wealth Management offers complete wealth management services as well as financial education to its clients throughout the greater Cleveland area. As an independent representative of LPL Financial, the firm provides complete wealth management services including retirement, estate and financial planning*; long-term care and insurance planning. The firm has a diverse client base including individuals, family offices, small businesses and corporations as well as endowments. Marvin Wealth Management builds client portfolios in house rather than hiring outside managers -- portfolios are comprised of stocks, bonds, mutual funds and alternative investment vehicles such as non-traded REITs. Marvin Wealth Management is a risk manager and believes that protecting clients' wealth from downside risk is as important as planning for upside growth potential. Principal Dennis R. Marvin, CFP® has more 20 years experience managing client portfolios. For more information, see www.marvinwealth.com.

Founded: Joined LPL Financial in 1997; over 25 years experience in financial services

Firm Size: More than $35m in AUM across 170 households

Investment Philosophy:

- As risk managers, Marvin Wealth Management believes that protecting clients' wealth from downside risk is as important as planning for upside growth potential.
- "Buy and hold" is no longer a viable investment strategy; rather investment portfolios need to be actively managed for today's volatile market environment.
- Builds client portfolios in house rather than hiring outside managers. Portfolios are comprised of stocks, bonds and mutual funds as well as alternative investment vehicles such as non-traded REITs.

Products/Services

- Financial planning.*
- Fee-based investment management.*
- Retirement and estate and planning.
- Long-term care and insurance analysis.
- Qualified and non-qualified plans for businesses and individuals.
- Access to tax and estate planning attorneys, CPAs and other financially related specialists.

Key Personnel

Dennis R. Marvin, CFP®
Daniel Kozdron, Director of Client Services