Weston Banks Wealth Partners

DESCRIBE YOUR PRACTICE

We are committed to revolutionizing the way wealth is managed. “Together for Significance” is our tagline and the heartbeat of our firm. Our passion is to work with clients as they shape what significance means to them, their family, and their business. This includes holistic integration of retirement planning, risk management, business succession, philanthropic planning, legacy, and wealth transfer.

DESCRIBE THE IDEAL CLIENT

We serve individuals, families, and business owners as a member of their professional advisory team (along with their CPA and attorney). Our ideal client desires to form an intimate relationship built on trust and integrity; whose goals align with creating significance.

DESCRIBE YOUR INVESTMENT PHILOSOPHY

Through a customized market gain leveraging system we call “FILL,” Forward Investing for Life and Legacy, we seek to help our clients merge their money with their lives. To limit the risk of relative underperformance, we measure against positive return goals in a financial plan rather than a market index. The focus is on generating positive returns and sidestepping losses by taking the excess gains out of the market to protect the gains and prevent further risk. Conserving excess gains, allows for stewardship, paying off debt or even dollar cost averaging back into market corrections.

WHAT IS YOUR PRACTICE'S CUSTOMER SERVICE MODEL?

Our team understands that every client is unique and should be treated as such. We seek to understand our clients’ visions, values, and goals so we can get to the core of what matters most, thereby assisting to merge their money with their lives. This client-led model is built around the cornerstones of communication, competence, education, accessibility and accountability.

DESCRIBE YOUR PRACTICE'S FINANCIAL PLANNING PROCESS:

We are holistic wealth managers. Our process begins and ends with a financial plan tailored to our clients’ stage in life - accumulation, nearing retirement, in retirement, or preparing to sell their business. Once we quantify our clients’ objectives, we can assess the investments required to plan for success.

DESCRIBE YOUR RISK MANAGEMENT PHILOSOPHY

Our risk management starts with individual client goals in mind. We strive to “participate with protection” and believe that there is value in sidestepping declines. By using a three account system (Appreciation, Balanced, and Conservation) we have a strategy to step aside in extreme volatility and reassess when the markets conditions present more stability.

Left to right: Brad Turlington, Director of Business Development; Amanda Buchanan, Client Relationship Specialist; Jason Steele, Financial Advisor; Lorry DeSantis, Senior Vice President; Preston Mokris, CFP™

CONTACT

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