Wealth Management, Inc.
Today. Tomorrow. Forever.

Our Services

Among the services we offer:

- **Asset Management Strategies**. We make and implement investment recommendations using stock mutual funds, bond funds, variable annuities, and alternative investments (gold, master limited partnerships, and real estate investment trusts for accredited investors only). We use proven investment managers with long-term track records, and we are constantly checking to make sure they are delivering value.

- **Retirement Planning Strategies**. We develop long-term retirement strategies that incorporate a client's current assets, projected income, Social Security, pensions, legacy goals, and more.

- **College Planning Strategies**. We create help to fund children's or grandchildren's college educations in a tax-efficient manner.

- **Estate Planning Strategies**. We discuss estate goals (inheritance, charity, and more), and devise strategies to address them. For clients who are likely to have large estates that will be subject to inheritance taxes, we work with experienced estate attorneys to address the legal and tax aspects.

- **Budgeting**. We identify gaps between current savings habits and goals to address long-term strategy, and we suggest ways to close the gap. Regular interaction with our licensed professionals helps to generate a commitment to meeting those goals.

Personal Communications

One aspect of our approach cuts across all types of service: personal communications. In working with hundreds of clients for more than two decades, we have learned that there is no substitute for direct and consistent personal contact.

Here's how we ensure that we are communicating consistently with each client about their unique situations:

- At the start of a client relationship, our in-depth meetings and detailed questionnaires help clients define their financial and life goals, suitability for certain types of investments, and long-term needs.
- Advanced software tools help us develop models for investments, savings, and spending patterns—which then form the basis for a discussion about meeting those goals.
- Our meetings with ongoing clients can last two hours or more. No question is too small or too simple to answer.
- We send regular written and electronic updates, both about your personal financial plan and also about the current state of the financial markets in general.

The result is that our clients have a step-by-step understanding of where they are headed. This produces a peace of mind that they are making good decisions during every stage of their lives.

Peace of mind comes because **FP Wealth Management, Inc.** is on your side.