2022 FIVE STAR WEALTH MANAGER

Adam Soloff

Director Financial Planning

Award winner announced in

***Philadelphia* magazine**

FIVE STAR PROFESSIONAL

ADAM SOLOFF

Director Financial Planning

WINNER OF THE 2022
FIVE STAR WEALTH MANAGER AWARD

Our mission is to help build and help preserve our clients' wealth

Licenses and Credentials

- CFP® – Certified Financial Planner practitioner designation
- EA – Internal Revenue Service Enrolled Agent
- Licensed in annuity, life, long term care, health, and disability Insurance
- Licensed in business, car, and home Insurance
- Member, Pennypack Environmental Restoration Trust (PERT), Finance Committee
- Author of the book Mindful Finance, 2016.

As the Founder and Managing Member of Soloff Wealth Management, Adam Soloff maintains an intense focus on helping his clients pursue their retirement and investment goals. Over the past 25 years, he has built enduring client relationships based on trust, integrity, and objective financial planning and investment advice.

As winner of the Five Star Wealth Management award for eight consecutive years, Adam understands that his most valuable assets are the relationships he builds with his clients. That's why he personally works with individuals to understand, grow, and preserve their portfolios throughout all stages of life.Offices in Warminster and Huntingdon Valley, PA Adam is a seasoned independent advisor, certified in financial planning and tax preparation. He has shared his extensive industry knowledge and experience by teaching Financial Planning at Pennsylvania State University from 2010-2016. He is a Federally Authorized Tax Practitioner with the IRS, allowing him to provide tax advice and representation.

Adam earned his Bachelor of Science degree from Pennsylvania State University before fulfilling his CERTIFIED FINANCIAL PLANNER TM™ requirements at the American College of Bryn Mawr. Prior to forming Soloff Wealth Management, Adam co-founded Lighthouse Wealth Management Group in Marlton, New Jersey, a financial advisory practice focused on investment management.

Adam is a Ten-year Five Star Wealth Manager award winner and has been featured in Philadelphia magazine.