FINANCE

Financial Planning with Knowledge, Integrity and Trust: Soloff Wealth Management

By Adam Soloff

In addition to being a Certified Financial Planner™ Practitioner (CFP®), Adam Soloff differs from others by being a federally authorized tax practitioner as an Enrolled Agent (EA) with the Internal Revenue Service (IRS). This allows him to represent clients before the IRS. Additionally, Adam is licensed in virtually every line of insurance. With his extensive industry knowledge and experience, Soloff teaches the Financial Planning course in Pennsylvania State University's Professional Development Program (Abington campus) designed for accountants and attorneys. He is personally approved by the state of Pennsylvania as a provider of continuing education to CPAs. The Penn State graduate serves as a news media resource, including KYW news radio 1060 AM and Financial Advisor Match, Inc. as well as Local Living magazine.

Soloff Wealth Management LLC has two divisions:

1. Access to personal financial planning: This includes investment, insurance, estate and tax planning. "With every new client, the first step is to have an initial consultation to gain a complete understanding of the financial picture," Soloff says.
2. Group benefits: Group health and group retirement.

"Despite the recent occurrences in Europe and Asia, the US markets have had a tremendous run in the past years. The outcome of the upcoming [Presidential] election will certainly provide a degree of guidance of what to expect, at least in the short term," says Soloff.

To fully understand the options, it is important to meet with a financial planner who is experienced in investment, insurance, estate and tax planning who can assess your plan and goals and make recommendations. Soloff's wife, Heather, is also on board as operations manager. The Huntingdon Valley couple has three children, Justin, 4 years old, Andrew, 2 years old and Samantha, 5 months old.

The couple established The Adam and Heather Soloff Charitable Foundation Fund, which is administered by The Philadelphia Foundation. Donations go to charities that focus on children with disabilities. "In our opinion, children with disabilities have a tough road ahead," Soloff says. "These charities provide services that help to build their confidence and provide early intervention so they can reach their full potential," Soloff says.

Company loyalty is becoming rarer these days. Adam Soloff, independent financial planner and founder of Soloff Wealth Management LLC, takes commitment to a company seriously. "A lot of financial planners jump from firm to firm," Soloff says. "But what makes or breaks an advisor's success is not the broker/dealer, it's their personal knowledge, integrity and trustworthiness." During his 17 years of practicing as a financial advisor, Soloff worked 10 years with one firm before starting his own business. "Investment research is worthless," says Soloff, "unless you know it's unbiased." Soloff's broker/dealer is LPL Financial, an independent broker/dealer without any investment banking or proprietary products. As a youth, Soloff worked his way through high school and college at just one business: Martin's Aquarium in Jenkintown, PA.

Soloff Wealth Management is located at 20 Roy Lane Huntingdon Valley, (215) 874-7147.
Email Adam.Soloff@SoloffWealth.com or visit www.SoloffWealth.com for more information.
Adam is the Director of Investment Services and Financial Services at Soloff Wealth Management, www.SoloffWealth.com. Access to Investments and Financial Planning through LPL Financial, a registered investment advisor and member FINRA/SIPC.