What is Comprehensive Wealth Planning?

Our role as your **Personal CFO** and **Wealth Advisor** is to look at all areas of our clients' wealth. Our team manages investments and also understands and analyzes topics below the waterline, which are often hidden from plain sight. Looking at all areas of our clients' wealth is called **comprehensive wealth planning**, and helps guide you, your family, and your team to make the best decisions to make your money and wealth work for you.