A Personal, World-Class Financial Experience

IN AN AGE WHERE AUTHENTIC HOSPITALITY IS HARDER AND HARDER TO FIND, THIS BOUTIQUE FINANCIAL FIRM DELIVERS A UNIQUELY PERSONAL TOUCH ALONGSIDE EXPERT FINANCIAL GUIDANCE.

Watermark Wealth Strategies was founded with one overarching vision: to exceed clients' expectations at every turn.

It starts with the gift of time. Using a multigenerational approach, Watermark advisors take the time to develop personal relationships with every family it serves—from grandkids to grandparents. Financial plans are individually crafted to account for every nuance in a family's financial trajectory.

"We're not trying to be all things to all people, but we do strive to be everything to our clients," says Founding Partner Kyle Richardson, CFP®.

For this reason, the firm's services have evolved and expanded alongside the very needs of the families it serves. In addition to helping clients journey toward, into, and through retirement, the firm also offers college planning, 401(k) management, company retirement plans, succession and exit planning for business owners, and more—all through a lens of tax efficiency.

The firm works with families from all corners of the country and all walks of life, though they've attracted quite a few from the airline and aerospace industries, as well as those in public service—a role that is especially informed by Financial Advisor OJ Liberta's experience as a retired Phoenix Police Department detective.

And, as an independent fiduciary that doesn't sell proprietary products, Watermark gives the promise that all financial recommendations are made in clients' best interests.

To further ensure families receive the dedicated time and attention they deserve, business growth is capped at 30 new families per year. "We run a tight filter on new clients because we want each relationship to be a mutually good fit," Richardson says.

ABOVE AND BEYOND

Though the Watermark team could rest proudly on their laurels knowing they've created a well-oiled, client-centric model of comprehensive financial services, they've chosen to take exceptional client care to the next level.

"We recognized that when our retired clients left the workforce, many were challenged to maintain their social connections, so we created a beneficial social network system to provide them with those opportunities," says Liberta.

Watermark's social events have included a car show, an Apple® tutorial day, a ladies' outing, expert speakers on Medicare and Social Security, a 200-person Christmas party, monthly happy hour events, and sometimes even seats in the prestigious Skybox Hole 16 at the Phoenix Open.

"We've had as many as 80 clients come to our happy hour events, and we never talk business. These get-togethers are just a time for social interaction," says Liberta.

THE NEXT GENERATION

Seeing the proverbial torch passed from generation to generation is one of Richardson and Liberta's most rewarding roles. "We get to retire 10 to 15 times per year vicariously through our clients. It's incredibly satisfying to see their goals come to fruition," Liberta says.

Serving multiple generations is so gratifying that the advisors hope their own children might someday enter their business to continue their legacy of exceptional multigenerational service.

"We acknowledge that financial planning isn't about the money," says Richardson. "It's about the quality of life that money can provide."

2151 E. Pecos Road, Suite #3, Chandler, AZ 85225
480-464-9300 | watermarkwealthteam.com

WATERMARK
WEALTH STRATEGIES LLC