

Client Profile

Retired Couples and Pre-Retirees
Financially Independent Women
Successful Entrepreneurs

- Have realistic expectations
- Understand financial strategies and products, but have a low level of interest in doing the work themselves
- Place a high value in delegating their financial decisions to a competent, trusted professional
- Are committed to not only developing a written financial plan, but also implementing it
- Wish to enrich the lives of friends & family by informing them of their positive client/advisor relationship
- \$250,000 or more of investable assets

Our clients are open-minded individuals with important plans for the future. They value service, advice and professional relationships. They are willing to pay fairly for our time and expertise.

Family Wealth Management is a professional firm providing customized wealth management solutions and services to an exclusive set of clients while protecting their financial assets and standard of living.



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