Personal CFO Services

Planning

- Comprehensive custom financial planning and reviews
- Ongoing cash flow and Retirement Income planning
- Income Tax and Estate planning
- Charitable gift planning
- Interactive Financial Planning website created for you based on your financial goals and assets

Investment

- Coordinated Investment management
- Sustainable Investment Strategies
- Integrated asset allocation

Risk

- Personalized risk management
- Life and property casualty insurance reviews
- Long Term Care insurance review

Service

- New client orientation
- Semi-Annual or Annual portfolio reviews and re-balancing
- Online account access
- Custom and timely financial information and ideas
- Complimentary comprehensive financial education
- Ongoing client appreciation and educational events
- Personal Concierge level service and 24-hour response time
- Advisors and staff that take the time to get to know you
- Access to a network of outside professionals

We seek to bring you a full spectrum of wealth management capabilities and resources necessary to address your financial needs. We value you as our client and value our relationship.

The Wealth Consulting Group

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