

Wealth. It's the result of hard work, planning, diligence, and dedication. Your wealth is there for one reason: to be enjoyed by you and your family. With so many factors affecting and potentially threatening your wealth today – tax structures, lack of liquidity, investment management just to name a few – it's more essential than ever to understand and align these factors with your needs and those of your family.

That's what Wealth Consultants can help you do.

**STRATEGIES THAT WORK TO
PRESERVE YOUR WEALTH.**

Working in concert with your team of financial management professionals, Wealth Consultants serves as a cross-disciplines manager and coordinator to make certain your financial goals, objectives and expectations are the focal point of all wealth planning activities.

Our unique interdisciplinary approach complements and leverages the advice you receive from your accountants, attorneys, investment and insurance advisors, private bankers and others, and results in a customized all-encompassing strategy designed to ensure that you and your family gain maximum benefit from your wealth.

What you get is a clear understanding of where your family's financial goals and values intersect, as well as the direction to confidently implement creative and profitable wealth preservation strategies that allow you and your family to have more - today and tomorrow.

**PLANNING THAT FITS YOUR NEEDS,
TIMING AND GOALS.**

To help you get the greatest benefit from our service, The Wealth Check-up™, our proprietary pre-engagement protocol and discovery process, provides the framework for your customized wealth preservation plan. It includes a thorough clarification of your personally defined goals and objectives, and indicates if you need a single, tactical response to a current pressing concern, or a comprehensive, strategic approach. Whatever the outcome, The Wealth Check-up™ guarantees valuable results to anyone who is accepted as a client of our firm.

To learn about results that are tangible, measurable and meaningful, contact us at: 203 352-2940.