




CPA WEALTH MANAGEMENT SERVICES



We make sure
your retirement plan
works just as hard
as you do!



CPA WEALTH MANAGEMENT SERVICES

A Unique Challenge

Successful professionals have unique challenges when it comes to their company sponsored retirement plan.

Achieving an optimal outcome requires:

- Creative retirement plan design to maximize saving opportunities
- Integrating the retirement plan with the financials of the business
- Looking at the retirement plan in context of personal wealth building

Off the shelf solutions from the 'big box' retirement plan providers are simply not enough.

A Unique Organization

From our years of experience working with our clients, and our personal experience as entrepreneurs, we saw that a blend of expertise was needed to optimize a company sponsored retirement plan. And, we observed that successful professionals had nowhere to turn.

CPA Wealth Management fills the void.

CPA Wealth Management Services helps successful professionals maximize workplace retirement savings as part of an overall strategy to build wealth.

We blend three critical areas of knowledge:

Retirement plan expertise	Experienced Certified Public Accountants	Accomplished Personal Wealth Managers
<i>Design custom retirement plans</i>	<i>Align retirement plan with your business's unique financial situation</i>	<i>Optimize role retirement plan plays in building your individual wealth</i>

Knowledge alone is not enough. We believe personal 'principal to principal' service is critical to listening and understanding each client's unique situation.

Bringing together this listening and expertise enables our clients to save more as part of their personal wealth accumulation plan while optimizing the tax situation of the business.

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CPA WEALTH MANAGEMENT SERVICES

A Unique Solution

CPA Wealth Management Services can act as an independent consultant working with your current plan provider or provide fully bundled retirement plan services.

So, you can benefit from our unique blend of expertise without changing your plan provider. We use a proven proprietary process to help our clients.

OUR UNIQUE PROPRIETARY PROCESS



This ongoing process reduces the complexity and improves the performance of retirement plans



This ongoing and structured process means that your retirement plan is continually updated to match the ever changing regulatory, personal, and business environment. We believe so strongly in our expertise and the Retirement Plan Optimizer that we acknowledge in writing our Fiduciary role in your retirement plan. This helps reduce your personal and business risk.

To Learn More



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To learn more about how our unique expertise and proprietary process can help you save more, please contact us to schedule a no cost Plan Profiler review for your retirement plan.

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