

## OUR SERVICES

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Being a boutique, independent-minded practice means we are beholden to none; rather, we work directly and only for our clients.

Goals-Based Financial Planning

(/ourservices#goals-basedplanning)

Tax & Estate Planning

(/ourservices#taxandestateplanning)

Investment Management

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True Portfolio Cost Analysis

(/ourservices#trueportfolio)

Strategic Lending

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Family Office Services

(/ourservices#familyofficeservices)

## OUR PARTNERS

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## MEET THE TEAM



(/meettheteam/marcshachtman)

### **MARC SHACHTMAN**

(/meettheteam/marcshachtman)

Marc Shachtman is the Founder and CEO of True Wealth Advisory Group, located in Miami, Florida.



(/meettheteam/monicaizquierdo)

## MONICA IZQUIERDO

(/meettheteam/monicaizquierdo)

Monica Izquierdo is the Director of Client Relations & Operations for True Wealth Advisory Group.

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# True Wealth Advisory Group

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## **IN PERSON**

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