Tavares | Winter Park | The Villages

NEW BOOK!

This is the blueprint to our scorecard that helps you improve your financial health in retirement, and achieve greater peace of mind.

BEGIN YOUR SCORECARD

Select a page...

Welcome to Ruggie Wealth Management

Our clients – individuals and families, businesses and foundations – come to us to develop, manage, and execute customized wealth strategies for them. They are busy, smart people who know they don't have the time, desire or specialized expertise to oversee the complex process of managing their wealth now and for the future.

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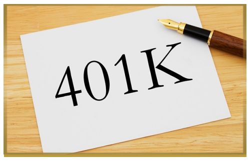
In the News +

Top 401(k)Advisors



Tom Ruggie has been named among the Top 40 Advisors by 401K Wire

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WealthCare for Retirees

Ruggie WealthCare® is a unique, four-step planning process and action strategy for retirees and those nearing retirement.

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RWM Recognized

In 2017, Florida-based Ruggie Wealth Management's Tom Ruggie was named to...

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RWM Trust Services

With $10 billion in assets under administration, NATC is one of the largest independent trust companies in the U.S.

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Strategic Partnerships

We create strategic partnerships and alliances with other leading firms to seamlessly manage...

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Locations

Ruggie Wealth Management is committed to maintaining strong relationships with our clients, and as a result, we've established a presence in locations which are convenient to the communities in which the largest number of them live and work. Our headquarters is located in Tavares, Florida, 35 minutes northwest of Orlando. We recently renovated our 4400-square-foot office in Winter Park just behind the Winter Park Village, which we will share with our partner firm Destiny Family Office, and opened our newest office in Pinellas Plaza on 466-A in The Villages® – the largest active 55+ community in the country.

History

Tom Ruggie began his financial career in 1991, and subsequently founded Ruggie Wealth Management to serve the needs of individuals, small businesses and non-profit organizations and agencies.

RWM, an independent Registered Investment Adviser (RIA), is part of the Ruggie Capital Group, which provides a continuum of financial services through its companies Edge Solutions, and our newest firms, Smart Assets Optimizer – which serves those who are just starting out and those seeking a simplified investment-based solution, and Destiny Family Office – which provides comprehensive investment and life-planning solutions to affluent individuals, entrepreneurs, entertainers, athletes and their families.

Through the years, we've added to our flagship office in Tavares, with offices in Winter Park and The Villages.

Ruggie Wealth's services have always been developed in response to client needs because we believe we can learn more from communicating well with our clients than imitating competitors.

Today, the collective wisdom of our relationships continues to define the Ruggie Wealth difference, and we believe this knowledge has led to our ranking among the nation's leading wealth management firms by the likes of Barron's and the Financial Times, as well as Tom's recent selection to the Forbes Finance Council.

With investment strategies and strategic partners all working toward accomplishing our clients' goals, Ruggie Wealth's client retention rate remains around 97%.

Purpose

As wealth managers, our purpose is to help clients achieve the financial peace-of-mind they deserve. We want to assist those who don't have the time, desire or specialized expertise to oversee the complex process of managing wealth by providing the processes, team and proactive advice necessary to do so. We would like to be at our clients' side every time they have an important financial decision to make, and to help them achieve the financial freedom necessary to focus their time on other things and to enjoy life.

Facts & Figures

Numbers help provide valuable context about our firm and how we've evolved to accommodate the needs of our expanding client base. Ruggie Wealth and its principals advise on more than $700 million in assets. We have three offices, client relationships that have spanned more than two decades, and an enviable client retention rate. Even so, we don't gauge our success solely on these numbers — we evaluate our effectiveness both quantitatively and qualitatively, and encourage those who work with us to do the same.

Ruggie Wealth Management Snapshot At a Glance

Ruggie Wealth Management is an independent, fee-only Registered Investment Advisory firm that takes the time to understand our clients and their needs. We manage individual and corporate wealth, as well as the assets of select endowments and foundations. We take our fiduciary responsibility very seriously. Decisions are made with our client's best interests in mind, and we are committed to serving each one with the highest standards of integrity and care. As the flagship company of Ruggie Capital Group, we offer a broad range of services and products to help clients achieve their goals.

RUGGIE

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