



You make financial decisions in all aspects of your life, many of which inadvertently impact others. At Wealth CMT, we approach this in a coordinated fashion

With over 50 years of combined experience counseling families and their foundations, our 100% independent, principal-owned registered investment advisory firm offers comprehensive solutions to our clients.





CREATE

CREATING YOUR
CUSTOMIZED STRATEGIC
WEALTH PLAN IS THE FIRST
STEP



MANAGE

TIMELY AND INSIGHTFUL
GUIDANCE TO HELP YOU
MAKE BETTER DECISIONS
ABOUT ALL ASPECTS OF YOUR
FINANCIAL LIFE



TRANSFER

EVALUATE YOUR OPTIONS
AND DEVELOP A WEALTH
TRANSFER PROGRAM THAT
PRESERVES AND DISTRIBUTES
YOUR ASSETS EFFECTIVELY



CUSTOMIZED SOLUTIONS FOR A COMPLEX WORLD

**LIFE WEALTH
STRATEGIES**



**INVESTMENT
ADVICE**



**CONTINGENCY
PLANNING**



**ONGOING
RESOURCE**



**CASH FLOW
MANAGEMENT
FOR TODAY AND
TOMORROW**

**IMPLEMENTING
RELEVANT RISK
MANAGED
STRATEGIES**

**COST EFFECTIVE
PLANNING FOR
LIFE'S "WHAT IF'S"**

**YOU HAVE A
PARTNER IN
DECISION
MAKING**

^
TOP

WealthCMT
create • manage • transfer

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