

Collingwood Wealth Management

8 Faneuil Hall Marketplace, 3rd Floor
Boston, MA 02109

Phone:

Office 617.973.5071

Toll-Free 855.357.2013

Cell 617.233.7447

Fax:

617.973.6406

info@collingwoodwealth.com

Contact Us

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Today's investment climate offers unprecedented opportunities. At Collingwood Wealth Management, our mission is to help clients take advantage of those opportunities by providing them with three key tools:

1. A clear understanding of their financial goals
2. A well-defined roadmap for achieving those goals
3. Ongoing advice to help adjust their roadmap when their needs change

Our services cover all areas of financial management, from investment and retirement planning to risk management and estate conservation. We specialize in helping our clients develop a comprehensive, cohesive financial strategy

that fits their unique needs and enables them to meet both short-and-long-term objectives. At Collingwood, we strongly believe that a well diversified and properly correlated portfolio is the key to obtaining maximum results.

If you have any questions or want to schedule a complimentary meeting to discuss your financial goals, please contact us at 617.973.5071 or by email info@collingwoodwealth.com today.



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