



Serving Clients Nationwide

The time is now to start preparing
for your financial future.

[Account View](#)



[Access Your Account](#)

[Request Info](#)

Check the background of investment professionals associated with this site on FINRA's BrokerCheck

Wealth Strategies & Management LLC (WS&M) offers a unique approach to financial services, providing the depth of resources most associated with a large firm and combining it with the personalized customer service expected of a boutique advisory firm. Currently, WS&M services a broad range of clientele across 23 states including other financial professionals, business owners, pre-retirees and retirees. WS&M prides itself on its superior attention to client relationships and access to a broad selection of financial strategies. Among these are investment opportunities, retirement planning strategies, institutional fixed-income management, education savings solutions, business services, and insurance and estate planning strategies.

Utilizing a proprietary financial analysis process, WS&M evaluates all aspects of each client's financial health in order to create a road map to pursue short term financial goals and long-term financial security. Everything from goal setting, investment policy statements, spending policies, business services, retirement plans, cash flow, debt analysis, endowment and foundation investing, and estate planning is reviewed in the initial analysis process. The end result is that WS&M clients are educated and informed about where their finances stand, how their money is working for them, and how they will work towards their future financial aspirations.

Phone: 570.424.1555 | Fax: 888.206.9930

Stroudsburg Office: 907 Main Street, Suite 102 | Stroudsburg, PA 18360

Wilkes-Barre Office: Waterfront Complex | 670 N. River Street, Suite 303 | Wilkes-Barre, PA 18702

The LPL Financial representative associated with this website may discuss and/or transact securities business only with residents of the following states: AZ, CA, CO, CT, DE, FL, GA, HI, IL, IN, KY, MA, MD, ME, MI, MS, MT, NC, NH, NE, NJ, NY, OR, OH, PA, RI, SC, TN, TX, VA, VT, WA, and WV.

Securities offered through LPL Financial, Member [FINRA/SIPC](#). Investment advice offered through Private Advisor Group, LLC, a registered investment advisor. Private Advisor Group, LLC and Wealth Strategies & Management, LLC are separate entities from LPL Financial.

PLEASE NOTE: The information being provided is strictly as a courtesy. When you link to any of the websites provided here, you are leaving this website. We make no representation as to the completeness or accuracy of information provided at these websites. Nor is the company liable for any direct or indirect technical or system issues or any consequences arising out of your access to or your use of third-party technologies, websites, information and programs made available through this website. When you access one of these websites, you are leaving our website and assume total responsibility and risk for your use of the websites you are linking to.

All Content ©2014-2017 Wealth Strategies and Management | Site design by Local Flair, Inc..