



MONEY DOESN'T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you're not alone.

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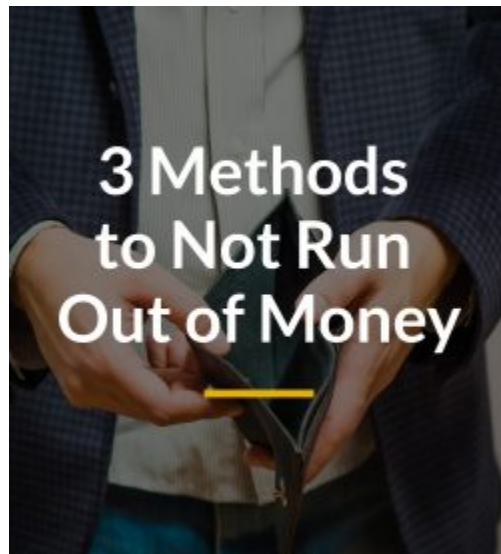
Effective Game Plan

Advice in Common Language

Straightforward Fees

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7 Tips to Successfully Transfer Wealth to Your Kids



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Forbes

FORBES TOP-RANKED TEAM



InvestmentNews
ICONS &
INNOVATORS

People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life, and your future.

At Waterstone Private Wealth Management, we believe
should t

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that advisors should be just as good about explaining investment they are at making them.



- + What are you going to do with my money?
- + Can you handle the complexity of my situation?
- + How can you make my life easier?

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?



0-2%



2-4%



4-6%



6-8%

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More than 8%



Next

How to get started.



1. Schedule an appointment



2. Meet with us for a custom listening session



3. Get your personalized strategy

Schedule an appointment

Watch video

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Schedule an appointment.

Please provide your name and email and we will have an advisor contact you.

First Name*

Last Name*

Email*

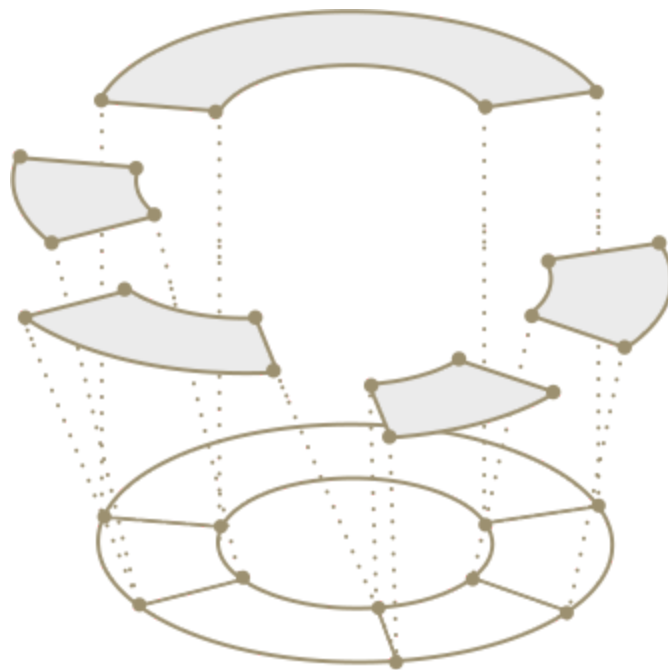
Phone Number*

Submit

Our financial planning services are built on trust,
transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power
– and a path – to realize your dreams. [Explore services](#)

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Personalized Wealth Management

Waterstone Private Wealth Management's mission is to bridge the gap between knowing and doing in the financial lives of our clients. We are a comprehensive wealth management firm in Owasso, Oklahoma serving affluent families, business owners and institutions. Our team provides a high level of service for our local and national clients in financial planning and investment management.

Contact us today and let Waterstone Private Wealth Management help you on your True Wealth journey.

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Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

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Carson Partners

Carson Partners is a network of growth-minded advisors with one common massive transformative purpose: to be the most trusted for financial advice.

[Read more](#)



Our Locations

Headquartered in Owasso, Oklahoma, Waterstone Private Wealth Management serves affluent families, business owners, executives and institutions. Contact us today to speak with a wealth advisor or financial professional nearest you.

[Read more](#)

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Insights

Waterstone's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. [Read more](#)



News

BUSTING THREE HALF-TRUTHS ABOUT REVERSE MORTGAGES

A few years back, I conducted and published research in the *Journal of Financial Planning* that showed Americans don't understand reverse mortgages. In fact, respondents scored below 50 percent on a 10-question true-false quiz.

[Read more](#)

Blog post

Weekly Market Commentary

HOW TO BUY A CAR
WITHOUT

HOW

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MIND (OR YOUR WALLET)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It's painful and annoying, I know I have to deal with it, but it's going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

[Read more](#)

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