LAKE TAHOE WEALTH MANAGEMENT, INC.
TAKE IT TO A HIGHER ELEVATION

Get ready to take control of your finances.

Who we are (https://laketahoewealthmanagement.org/about-us/)

Lake Tahoe Wealth Management, Inc. provides deeply integrated and true fee-only fiduciary wealth management services to our clients.

We specialize in providing holistic financial planning and investment management services to individuals, families, businesses, trusts, and retirement plans.

In addition, every single one of our Financial Planners is a CFP® and will always act in the clients best interests.

Lake Tahoe Wealth Management, Inc. delivers our services to clients across the United States, with local Financial Planners in Nevada, California, New York, and South Carolina.

While our team is located physically in the above mention states, we are location independent.

Due to our investment in technology, we have the ability to work with you virtually irrespective of your location as long as you have an internet connection.

Our Services & Prices

You can select the program that makes the most sense for your circumstances.

With our flexible, needs-based planning our fees work around you not against you.

See All Services » (https://www.laketahoewealthmanagement.org/prices-services/)

What Is a Fiduciary?

To put it simply a fiduciary is your financial guardian.

Doing everything in their power to help you reach financial success which is something that looks different for everyone.

All CFP® practitioners are held to a fiduciary standard and our team is made ENTIRELY of CFP® practitioners.

Our Fiduciary Statement » (https://www.laketahoewealthmanagement.org/fiduciary-statement/)

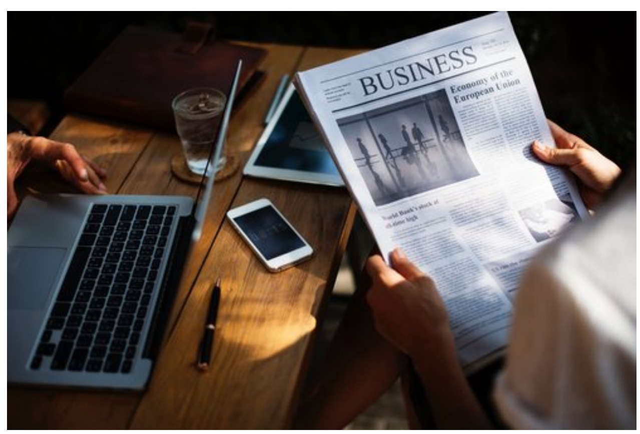
News & Notes

Keep up with our articles and company updates.

Anything from personal finance, behavioral economics, market updates, and other interesting topics.

All of the articles are written by our team of professionals.

Read Our Blog » (https://www.laketahoewealthmanagement.org/news-notes/)



We take the stress out of financial planning. With virtual meetings, you can say goodbye to traffic, parking hassles, and poor weather.

For the convenience of our clients we also have brick and mortar offices in the locations below.

Our philosophy

Our philosophy is simple. We want to be your thinking partner in order to help you make the best decisions possible.

As a firm, our focus is to understand your goals and develop a plan to reach them.

We will meet with you to present an analysis and discuss our recommendations.

Together we implement the recommendations and monitor your progress.

From here, we will plan regular meetings with you to assess the progress toward your goals and, when necessary, we will make adjustments to your financial plan.

As there are many factors that may change in your situation or the environment, it is of the utmost importance to us to be proactive and knowledgeable in the financial industry.

We are committed to staying up-to-date on relevant tax, estate and social security laws in order to provide you with the best financial advice for your particular situation.

Fee-Only Financial Planning

Your retirement should not be a stressful time. You should not have to worry about your Financial Planner not getting you the best investments.

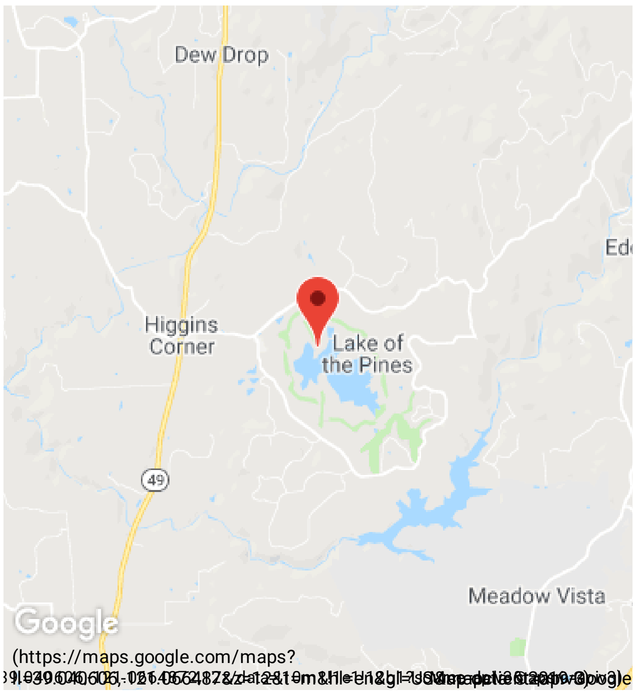
When Planners take commissions they have their eyes on one thing only and that's the highest commissions possible which can lead to sub-par investments for you.

Here at Lake Tahoe Wealth Management we are compensated directly by you in order to minimize conflicts of interest .

If you would like to see how these fees play out please take a look at our Price and Services (https://www.laketahoewealthmanagement.org/prices-services/) tab.

We disclose all of our fees as we believe that transparency is key to building client trust.

Locations



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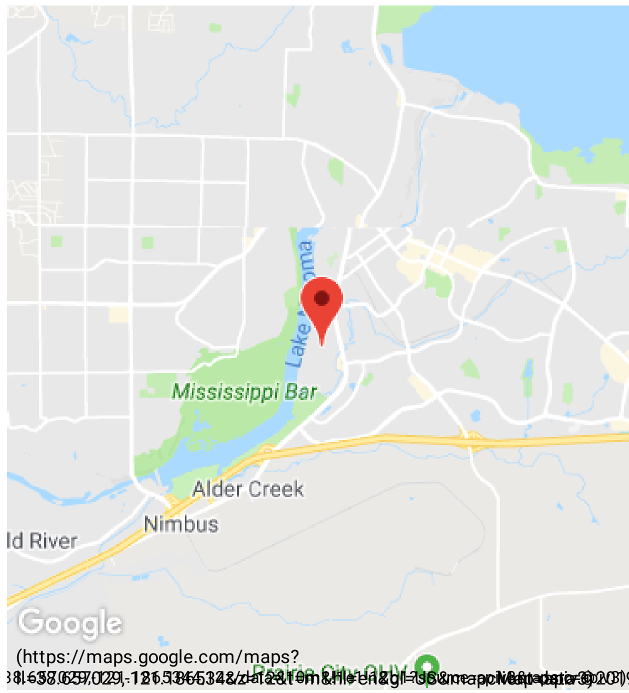

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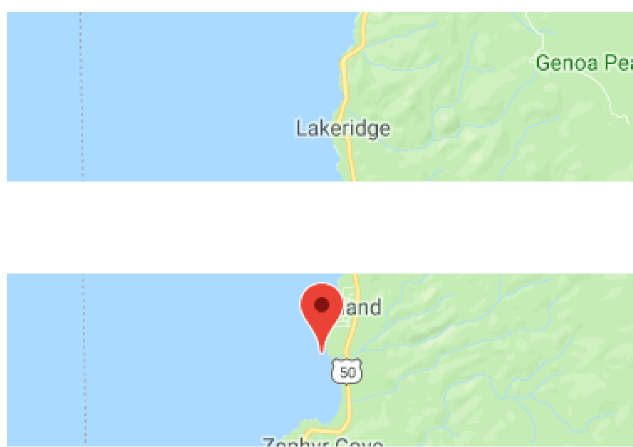
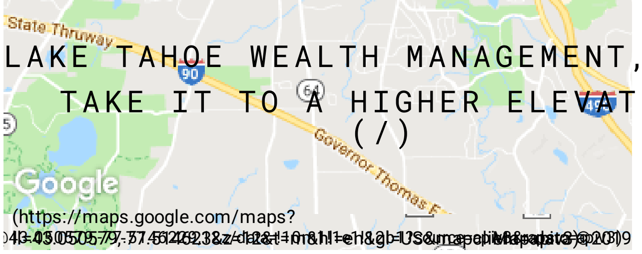
AUBURN CALIFORNIA LOCATION

LAKESHORE NORTH AUBURN, CA, 95602, UNITED STATES

FOLSOM CALIFORNIA LOCATION

101 PARKSHORE DR # 100 FOLSOM CALIFORNIA 95630, UNITED STATES



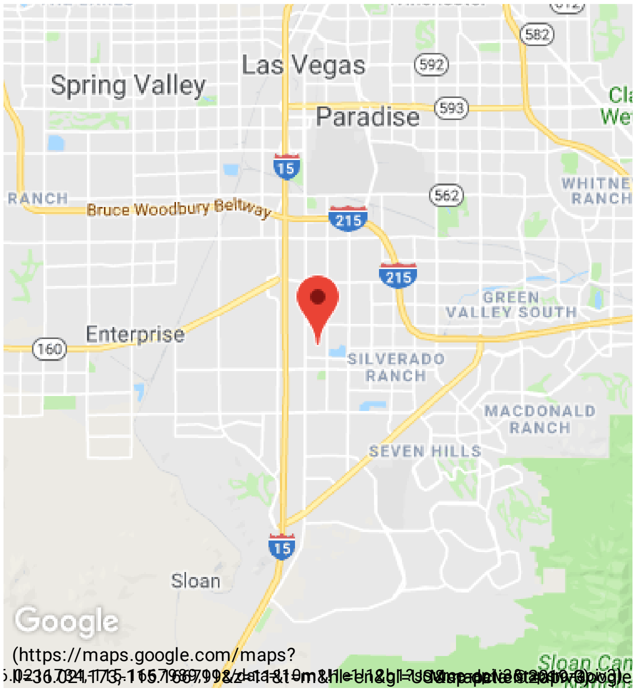


ROCHESTER NEW YORK LOCATION

11 EPPING WOOD TRAIL PITTSFORD, NY, 14534, UNITED STATES

LAKE TAHOE NEVADA LOCATION

PO BOX 366 ZEPHYR COVE, NV, UNITED STATES



LAS VEGAS, NEVADA LOCATION

123 TWIN TOWERS AVENUE LAS VEGAS, NV, 89123, UNITED STATES

Let's talk!
Your first consultation is free.

SCHEDULE (HTTPS://WWW.LAKETAHOEWEALTHMANAGEMENT.ORG/CONTACT-US/)

Or call us at (855)-515-5896