LWS Wealth Advisors

LWS WEALTH ADVISORS PROVIDES FINANCIAL PLANNING & ASSET MANAGEMENT SERVICES TO HIGH NET WORTH INDIVIDUALS

WE SIMPLIFY COMPLEX FINANCIAL LIVES

LWS challenges herd mentalities, offering a new direction for those tired of the sameness offered by Wall Street. Our commitment is to understand your complete financial picture, and consistently deliver solutions reflective of your evolving needs.

We take great pride in our highly attentive and detail-oriented approach to wealth management, delivered with proactive communication, personalized service and industry leading technology.

COMPREHENSIVE FINANCIAL PLANNING AND ASSET MANAGEMENT SOLUTIONS

WEALTH MANAGEMENT SERVICES

WEALTH ACCUMULATION

WEALTH PRESERVATION

WEALTH TRANSFER

- Concentrated positions and executive compensation packages
- Monetization of privately held businesses
- Cash-flow planning and cash management
- Liability management
- Retirement income strategies
- Income tax planning

appetite and the development of a prudent corresponding strategy

- Introducing asset classes with historically low-to-negative correlations
- Utilizing hedging strategies where appropriate to further diversify exposures
- Identifying and managing the taxability of the overall financial plan
- Addressing inflationary pressures on lifestyle and income objectives
- Working closely with insurance professionals to ensure proper levels of coverage

- Multigenerational wealth transfer strategies
- Charitable giving strategies
- Next generation financial education and financial planning
- Asset and income replacement strategies
- Business succession planning

SYNCHRONIZED FINANCIAL MANAGEMENT DELIVERED BY YOUR DEDICATED SINGLE POINT OF CONTACT

FAMILY OFFICE SERVICES

An extension of our wealth management practice, LWS Family Office Services offers a fully coordinated experience across all facets of your financial picture, streamlining the complexities and responsibilities that come with significant wealth.

We work closely with accountants and attorneys to mesh planning with execution in a collaborative relationship designed to maximize our client's experience and success.

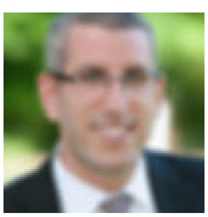
STEWARDSHIP

LWS Wealth Advisors, Inc. was founded under a simple yet resolute tenet that the client's interests must always come first.

As banks and brokerage houses commingled traditional wealth management with high stakes revenue sources, LWS was structured as an advice-based, client-centric environment without ownership ties to Wall Street.

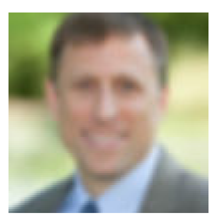
The LWS platform offers comprehensive planning, unbiased advice, and the security of a multi-trillion dollar custodian.

ABOUT US



Lance Lipset, CFP®
Managing Principal
Wealth Advisor

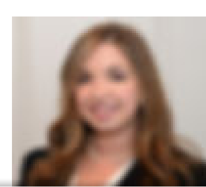
Lance is the founder & Managing Principal of LWS Wealth Advisors, Inc. In this role, Lance oversees the strategic direction of the firm’s wealth management and family office practices. More on Lance



Gregg Cohen
Director of Fixed Income
Wealth Advisor

As a Wealth Advisor, Gregg utilizes extensive capital markets experience to implement a disciplined approach to investment management and the creation of comprehensive financial plans.
More on Gregg

Marc Lescarret, CFP®
Wealth Advisor



Valerie Downs, CFP®
Wealth Advisor

provided asset manager due diligence to institutional investors.

considerations.

Linda Ferreira
Client Service Associate

With more than 25 years of experience in financial services, Linda manages clients' day-to-day operational needs including private banking services and liaising with client account custodians.

CONTACT US

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