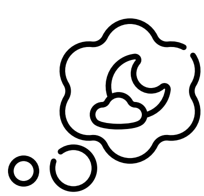
WEALTH
MANAGEMENT

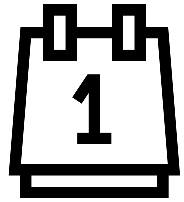
You're Walking The Path Toward Retirement

Let's Make Sure Your Finances Are Too

Get Started Today

Where Are You On the Road To Retirement?





Right Around the Corner

With just a few more years to go, you know it's time to kick your retirement planning into high gear by fine-tuning your financial plan and focusing on your future income.

Past the Finish Line

The retirement party is over and you're turning off the alarm clock for good. It's finally time to reap the rewards and weigh your income options to make your money last.

Wherever You Are, We Can Help.

Common Retirement Questions

Your Journey To Retirement

Shouldn't Be Traveled

We're MY Wealth Management, Inc.

An independent, Registered Investment Advisory (RIA) firm focused on standing by your side as you prepare for retirement, enjoy your independence and pass on your legacy. We understand that life doesn't always move forward as planned. That's why we're here to help you navigate the twists, turns and bumps ahead as you move into and throughout retirement.

We Believe in Being:

Fiduciary

In taking our fiduciary duty seriously, our firm is focused on finding solutions that benefit you and your family. There are no hidden agendas or ulterior motives. Instead, we only act in what we believe will be your best interest.

Responsive

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Transparent

In treating you how we'd want to be treated, we aren't interested in nickel and diming you. Instead, you can be sure hidden fees and confusing costs won't be a part of your experience here. Our fee schedule is clear and transparent for your convenience.

Knowledgeable

Our president, Jeff Yeakle, is a CERTIFIED FINANCIAL PLANNER™. Not only has he had to pass rigorous testing to receive this certification, but he is also held to one of the industry's highest standards of ethics.

How We Got Here

In 1978, our founder Pete McGlaughlin started Tax Qualified Trusts, Inc. Jeff Yeakle joined Pete in 2003, as the firm became McGlaughlin Yeakle. In 2013, Pete and Jeff ventured into the Registered Investment Advisory world as they officially formed MY Wealth Management, Inc.

To this day, we're happy to honor Pete's vision of providing every client with personalized attention, independent advice and excellent service.

WEALTH
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Together We'll Develop Your Roadmap to Retirement

Our Clients

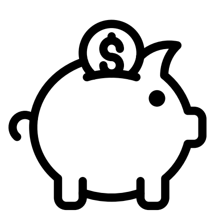
Our Services

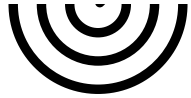
Fees

For Us, It's Not About How Much You Have

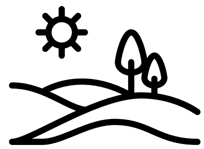
Whether you've accumulated tens of thousands or a couple million, your net worth isn't our primary focus. Instead, we're interested in working with clients who've always strived to make sound financial decisions with what they have. You may not be driving a sports car or acquiring a yacht anytime soon, but you're ready to maximize your wealth's potential as you prepare for and enter into retirement.

We Value Clients Who Are…





Financially Focused



Nearing Retirement

Retired

Does This Sound Like You?

See Our Services

Are You Ready

For the Road Ahead?

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We’re excited to put our experience, integrity and financial planning passion to good use as we develop your comprehensive roadmap for retirement. Whether you’re a few years out or already enjoying financial freedom, our team is here to help however we can. Give us a call or fill out the form below to get started today!

NAME

EMAIL

PHONE

MESSAGE

Send

LOCATION

814 West Diamond Avenue

WEALTH
MANAGEMENT

OFFICE HOURS

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