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AYCOCK WEALTH MANAGEMENT

1031 Exchanges + Tax Strategies +

Creating and protecting wealth since 2013

Headquartered in Nashville, Tennessee, Aycock Wealth Management represents clients both on and between our two coasts. Our firm specializes in working with real estate investors and ultra-high income earners. You have worked hard to create significant wealth or a substantial income, my role is to help you protect and preserve it.

We pride ourselves in the hands-on due diligence process which is performed on each recommendation that we make.

Get in touch with us to set up a no-obligation consultation, or use the contact form at the bottom of this page to inquire whether our services are right for you.

Contact

► LOCATION

2740 Old Elm
Hill Pike, Suite
207
Nashville, TN
37214

☎ CONTACT

billy@aycockwealthm
(615) 397-9983

Areas of Practice

1031 REAL ESTATE EXCHANGES

Real Estate investors across the nation are looking to sell and lock in gains but are wary because of the tax burden that creates. We allow investors to gain access to institutional-level assets across many real estate sectors while utilizing IRC Code Section 1031 to defer capital gains taxes.

ENDOWMENT MODEL INVESTING

Investing doesn't just mean money in the stock market. Endowment model investing means translating what the major university endowments such as Yale or Harvard are investing in and applying that to the affluent investor.

TAX PLANNING STRATEGIES

A solid plan is key to tackling your tax burden. Whether you are an ultra-high income earner or a business owner experiencing a large capital gains issue, our unique product offerings allow us to create a plan that most cannot.

LEGACY PLANNING

An estate plan is also a key component to every long term financial plan. A plan that is in place to give piece of mind that your assets are protected leaving a legacy for future generations.

REAL ESTATE ANALYSIS

We are able to work with investors on their real estate portfolios. Analysis to determine assets that are under-performing, over-leveraged or in need of refinancing. We recommend steps to defer taxes and efficiently pass assets to heirs.

MANAGED MONEY

Planning is the foundation of any financial plan. We use a blend of tactical money managers with the goal of providing a return that exceeds the risk on a portfolio.

“We must
all obey
the great
law of
change. It
is the
most
powerful
law of
nature.”

— EDMUND BURKE

Let's Chat.

Use the form below to contact us regarding your financial situation. Please be as detailed as possible. No trade orders can be submitted via this contact request. To help us best service your inquiry, we recommend that you first describe the question you're having before telling us what you want to achieve. You may also email or call me to make an appointment.

Name *

First Name

Last Name

Email Address *

How Can We Help? *

Please do not include confidential or sensitive information in your message. Also, no trade orders may be submitted and will not be acted upon.

SUBMIT

Licensed in AL, CA, GA, FL, MD, NJ, NY, OK & TN.

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