Arbor Wealth
ADVISORS

Smart Strategies for Established Executives & Retirees

Welcome to Arbor Wealth Advisors

🌲 I focus exclusively on financially established executives and retirees who need help implementing wise financial strategies.

🌲 I work with a small, select group of clients – most of whom I proudly call friends. I place high value on long-term relationships built on trust and open communication. I will be there when you need me.

🌲 The flat, annual fee my clients pay is based solely on the complexity of their unique situations and is the only compensation I receive. It is simple and ensures freedom from conflicts of interest. I'm not compensated via commissions or a percentage of assets under management. I don't push products or benefit when you accept my recommendations. My advice is totally objective.

🌲 My investment philosophy is grounded in academic evidence and not on the typical Wall Street model, which is designed to make money for them, not you. I don't believe in stock picking or trying to outguess the market.

🌲 As a Registered Investment Advisor, I'm obligated by law to act in your best interest. Banks, brokers and insurance agents are held to a lesser standard and incentivized via commissions and other conflicts.

🌲 If your philosophies echo mine, I hope you'll reach out to me.

I believe in **10 Simple Investment Principles** that increase your odds of success.
Click here to see them.

Click below to find out more about Aaron Andreas.

Arbor Wealth Advisors has a succession agreement in place with Buckingham Strategic Wealth. BAM Advisor Services, an affiliate of Buckingham, is a sub-advisor to clients' portfolios and provides other back office support.

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Disclaimers