STARTING A BUSINESS, RAISING A FAMILY, MANAGING TUITION, INVESTING FOR THE FUTURE...

The New Wealth Project harmonizes the benefits of modern technology with the personalized touch of a trusted advisor. This integrated financial planning approach connects your strategy with your life's purpose.

START PLANNING

WATCH OUR VIDEO

WHAT THE NEW WEALTH PROJECT IS NOT

NOT YOUR "DAD'S GUY"

Many turn to those who have served family members as a default resource for financial advice without knowing there are better options. The New Wealth Project is an approach tailor made for modern professionals, modern families, and modern leaders.

NOT A DIY APPROACH

Technology has made financial markets better, but pitfalls remain for those who go it alone. The New Wealth Project uses modern financial planning tools combined with the human touch of a professional advisor to avoid big mistakes.

NOT A PRODUCT SALESPERSON

There are thousands of product salespeople masquerading as financial advisors who are more motivated by sales quotas than client outcomes. As a fee-only fiduciary, The New Wealth Project has a legal obligation to put our client's interests first.

LEARN MORE

WHAT IS THE NEW WEALTH PROJECT

The New Wealth Project guides smart and motivated people to move confidently down the road to financial independence through a framework of critical decision making and a system of continual upgrade and growth.

By connecting strategy with purpose, and by offering both financial and life planning, The New Wealth Project impacts our client's lives today and creates a ripple effect for years to come.

The Personal Mission Builder is a complimentary session in which family goals are prioritized and action items are organized.

The Cash Flow Roadmap delivers an organized framework to optimize family income and savings.

The Capital Growth Formula uses evidence based principles to create your unique investment plan.

The Protection Solution helps you establish your fundamental estate and insurance plan.

PERSONAL FINANCE STRATEGIES

Today's marketplace lacks high quality comprehensive financial advice for the emerging wealthy. The New Wealth Project sets out to change that.

THE YOUNG FAMILY WITH COMPETING PRIORITIES

IS THIS YOU?

SINGLE PROFESSIONAL STRIVING FOR FINANCIAL INDEPENDENCE

IS THIS YOU?

EMERGING LEADER SEEKING ADVICE AND DIRECTION

IS THIS YOU?

WHAT'S MOST IMPORTANT TO YOU?

SET YOUR PRIORITES

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