CESTIA
WEALTH MANAGEMENT

OUR MISSION STATEMENT:

To support serious investors seeking advice and counsel to reach their personalized life goals.

We do this through superior service coupled with proven processes to achieve desired goals of individuals.

Cestia Wealth Management's goal is to help investors accumulate, maintain, enjoy and pass on wealth. Burt and his team have been in the investment business for over 18 years helping people to establish, reach and enjoy life goals they create. By understanding what is important to clients - and using established, proven processes we tailor strategies for each client helping them to reach individualized goals. We believe clients need tailored solutions to achieve personal goals. High quality investments coupled with superior service make this experience enjoyable and lasting. We enjoy partnering with clients for the long term and building relationships that last generations. Partnering over time, we adapt to life’s changes and adjust the strategies to ensure goals are met.

Just Starting Your Investing Career

Whether you're a recent graduate or just getting started in your financial life, managing finances can be challenging at first, but with proper planning, we can help answer your questions.

Working Professionals and Business Owners

Your working years will be some of the most vital for your investment success. As your income rises, so should your investment deposits. We can assist you with answering some of the most difficult questions you may face during your working years.

Entrepreneurs and Small Business Owners

Why not be the boss of your retirement? We partner with other professionals to offer services specifically aimed towards business owners and their questions.

Retirees

You've spent years preparing, and now the time is here. Retirees have unique financial positions – and generally lots of questions. We understand your questions and will work with you to ensure your retirement is everything you want it to be!

Check the background of your financial professional on FINRA's BrokerCheck.

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