



☎ 631.386.8461

# **ABOUT THE CHOICE GROUP WEALTH MANAGEMENT**

Our partnership originated with the vision to create an integrated financial services structure focused on serving the unique needs of individuals, corporate executives, family owned businesses and public businesses.

Our process begins with outlining the specific goals of the individual or company. Goals-based wealth management generates strategies and solutions based upon the clients risk tolerance, time horizon, liquidity needs and overall investment goals. Each solution is tailor made for the clients expressed target or intention.



## RETIREMENT PLANNING

Enjoy the fruits of your labor. The Choice Group Wealth Management will help plan for your retirement and excite you for what's to come.

[LEARN MORE](#)



## **COLLEGE PLANNING**

Rising education costs require a forward-thinking plan. The Choice Group Wealth Management can help you prepare for one of life's biggest investments.

**LEARN MORE**



## **BUSINESS PLANNING**

We believe small businesses are the backbone of America. At The Choice Group Wealth Management, we do our utmost to help your business thrive.

[\*\*LEARN MORE\*\*](#)



## MEET OUR TEAM

Our team of professionals have years of of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

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## OUR GOALS

We provide a range of offerings that can be combined to pursue the desired goal.

- Asset Allocation
- Investment Strategy
- Trust and Estate planning Strategy
- Discretionary Portfolio Management
- Alternative Investments
- Concentrated and Restricted Stock Management
- Insurance Services
- 401k and Deferred Compensation
- Liquidity events

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We are committed to deliver to you extreme diligence in the oversight of the assets that you have placed under our care. We thank you for your trust and confidence and look forward to working with you and your families for years to come.

We invite prospects to meet with us to discuss their goals and the ways in which our team can help. Our extensive network of professionals provides us with an effective means of addressing a wide range of needs. When needed we will collaborate with your other trusted advisors to ensure everyone works together to pursue your stated goal with tax and time efficiency.





# HAVE A QUESTION

Name

Email

Phone

Question

**SEND**

## Contact

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