

Your Financial Connection

Financial Planning When You Want It All

Are You Cultivating Wealth? Take Our Quiz to Rate Yourself!

[Take the Quiz](#)

As seen in

Why Cultivating Wealth?

Advice You Can Trust

We live here too and understand your needs.

We are a fee-only, fiduciary firm. We do not accept sales commissions and have a legal obligation to make recommendations in your best interest.

A Custom Financial Plan

You are busy and we get that. Who has time for a third job?

Expect quick communication and updates so you always know where you are.

Understandable Expertise

The Cultivating Wealth team communicates technical financial planning advice in simple terms, enabling our clients to make decisions with confidence and clarity.

Our fee-only fiduciary advisors hold the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation.

It's Easy to Get Started

Introduction

We know that finding trustworthy financial guidance can seem overwhelming. That's why we start every client relationship with an obligation-free 15-minute introductory call. No strings attached – simply an opportunity for you to see if Cultivating Wealth is the best fit for your needs.

Discovery

We'll work together to gather your financial information and map out both your short- and long-term goals.

Solutions

Using your goals and values as a guide, the Cultivating Wealth team will work with you to create a set of personalized recommendations based on your unique financial situation.

[Schedule Your 15-Minute Intro Call](#)



Can You Afford Private School?

by Sara Stanich | May 15, 2019 |
Cash Flow, Kids, Planning

School! It's a topic that many New Yorkers have spent way too much time researching, thinking about and discussing at cocktail parties. In New York, the sheer number of options can make "the school decision" especially daunting. Many of our clients are considering...



Looking for a New Accountant? What to Ask Now

by Sara Stanich | Feb 4, 2019 |
Taxes

Tax return is now due Tax season is here again, and for many of my clients, that means it's time to reach out to your CPA – or to find one if you haven't yet! But if you are looking for a (new) accountant, what should you ask him or her? Here are some questions to get...



Pros and Cons of Rising Interest Rates

by Sara Stanich | Jan 11, 2019 |
General

The Fed raised the target interest rate four times in 2018, and another one to two raises could

happen this year. Rising interest rates often make the news. But are they a good or a bad thing? It depends on your perspective. ...

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Are You Cultivating Wealth?

Are you trying to do the right thing financially, but unsure about your strategy or progress?

Schedule a Discovery Call with Sara to see if you are on track.

[Schedule My Call](#)

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Ready to talk?

[Schedule a Call With Us](#)

More Info



[Disclosures](#)

