



LET US BE THE BRIDGE TO YOUR FINANCIAL GOALS

Freitas Wealth Management is an investment and financial planning firm located in Aiken, SC. We have been working with our friends and neighbors throughout the Central Savannah River Area (CSRA) to assist them in pursuing their financial goals. We have deep roots in our community and have developed our business by fostering close personal relationships with our clients. When you have financial concerns, we are here to help you address them.

INDIVIDUAL & FAMILY SOLUTIONS SOLUTIONS FOR BUSINESSES

TAX & ACCOUNTING SOLUTIONS

What We Do





Personal Investment Solutions

At Freitas, we know planning for your legacy is important. Please visit the below pages in order to learn more about our solutions for families and individuals.

- ✓ Investment Management
- ✓ Retirement Planning
- ✓ Estate Planning
- ✓ Comprehensive Financial Planning
- ✓ Insurance and Risk Management
- ✓ Education Planning



Employee Benefits Solutions

A happy employee is a loyal employee and you want the best benefits a company may offer. Let our team help you with your employee benefits package and company retirement plan needs.

- ✓ Retirement Plan Solutions
- ✓ Employee Benefits Solutions



Tax and Accounting Services

As part of our holistic approach to financial planning, we can not emphasize enough how proper tax planning is a key component to the planning process. As a result, we've partnered with Master Tax & Accounting to provide tax and accounting services for both individuals and businesses.

- ✓ Individual Tax Services
- ✓ Corporate Tax Services

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