



(<https://www.slatestone.com/>)

Balancing Your Life Goals with Financial Results

Symbolizing balance and stability, our stacked stones mark a pathway toward your one best financial life.



SlateStone Private Client is pleased to welcome clients and employees of Weston, FL-based independent investment advisor, Emerald Asset Advisors, as it completes its combination!

[READ MORE \(/WP-CONTENT/UPLOADS/2019/06/WEBSITE-EAA-WELCOME-POST-FINAL.PDF\)](/WP-CONTENT/UPLOADS/2019/06/WEBSITE-EAA-WELCOME-POST-FINAL.PDF)

Our Purpose is to Help You:

Build

...a durable foundation of true financial independence.

Create

...a lasting legacy for you and those you most care about.

Fulfill

...your lifetime aspirations and achieve your financial goals.

At SlateStone Wealth, we build enduring partnerships focused on your success. We provide creative, customized and comprehensive wealth management solutions to help protect and grow your wealth.

Our goal is to be your primary advocate, building a lasting partnership to help you live your one best financial life.

Creative Solutions

Where your aspirations meet our inspiration.

Building a durable financial foundation that balances your personal and financial goals requires creativity; it means thinking about your wealth in a different way.

After all, wealth is not a destination, it's a means to live the life you envision.

By understanding your priorities, we gain a sense of perspective. And together, we turn your ideas into an actionable financial plan built to last a lifetime – and beyond.

Creativity applied to your finances can help us solve problems and open a pathway to new opportunities.

Our team puts decades of experience behind you to coach you along life's path, offering solutions and suggesting course corrections so you have greater clarity, confidence and control over your life.

We put insights into action.

Life Guidance & Planning

We identify your unique needs, then create a tailored wealth plan that serves as a roadmap for our advisory relationship.

[KNOW MORE \(/LIFE-GUIDANCE#CWP\)](/LIFE-GUIDANCE#CWP)

Custom Asset Management

Our dynamic investment approach is based on positioning a portfolio for real growth while avoiding a permanent loss of capital.

[KNOW MORE \(/CUSTOM-ASSET-MANAGEMENT/\)](/CUSTOM-ASSET-MANAGEMENT/)

Women & Wealth Solutions

Women working with women to provide clarity, confidence and control over their financial futures.

[KNOW MORE \(/WOMEN-AND-WEALTH-SOLUTIONS/\)](/WOMEN-AND-WEALTH-SOLUTIONS/)

Our Corporate Leadership Team

We have built a culture where inspiration, improvement and accomplishment are words that bind us in our mission to help our clients realize their life's goals and aspirations.

Sharon “Sherri” Daniels

Co-Founder, Managing Partner

Patrick E. Tylander

Co-Founder, Managing Partner

David J. Costigan, CFP®

Managing Partner

Milagros “Millie” Kleiner, MBA

Chief Compliance Officer, Partner

OUR FIRM (/OUR-FIRM).

Let’s Talk

Contact us for a Complimentary Portfolio Review

CONTACT US (/CONTACT-US).

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