SMALLWOOD
WEALTH MANAGEMENT

GUIDING YOU EVERY STEP OF THE WAY BY...

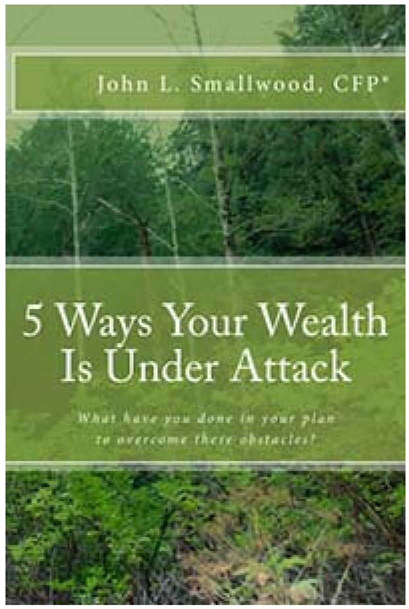
Providing Confidence and Clarity in Wealth Building Strategies

LET'S GET STARTED

EASIEST WAYS TO GET STARTED

OUR BOOK

5 Ways Your Wealth Is Under Attack



REQUEST YOUR COPY

SCHEDULE

Talk to a Smallwood Wealth Management Financial Advisor, No Cost, No Obligation

VALUE CONTENT ON IMPROVING YOUR WEALTH CURVE

CONNECT & EDUCATE

Wealth Curve Talk Podcast

EPISODE #044

SECURE ACT & RESA: New IRA Rules on the Way

July 04, 2019

EPISODE #043

ASSET PROTECTION TOOLS FOR BUSINESS OWNERS

June 26, 2019

EPISODE #042

WILLS AND TRUSTS

June 19, 2019

EPISODE #041

LIFE INSURANCE NON WORKING SPOUSE

June 12, 2019

WEALTH CURVE TALK WITH JOHN

Why Wait? Financial Freedom is Yours.

CONTACT US

Smallwood Wealth Management stands ready to be your trusted professional team.

WHY SMALLWOOD

Our clients choose Smallwood Wealth because they have reached a level of financial success that they know they need assistance in managing. They want a big picture approach to wealth management, looking at all the aspects of their plan.

✔

OUR JOB

Current financial circumstances are unique to each individual. Our collaborative approach organizes your financial assets and strategy to help you make sense of what you own; and more importantly, how financial pressure can impact your wealth and its potential.

★

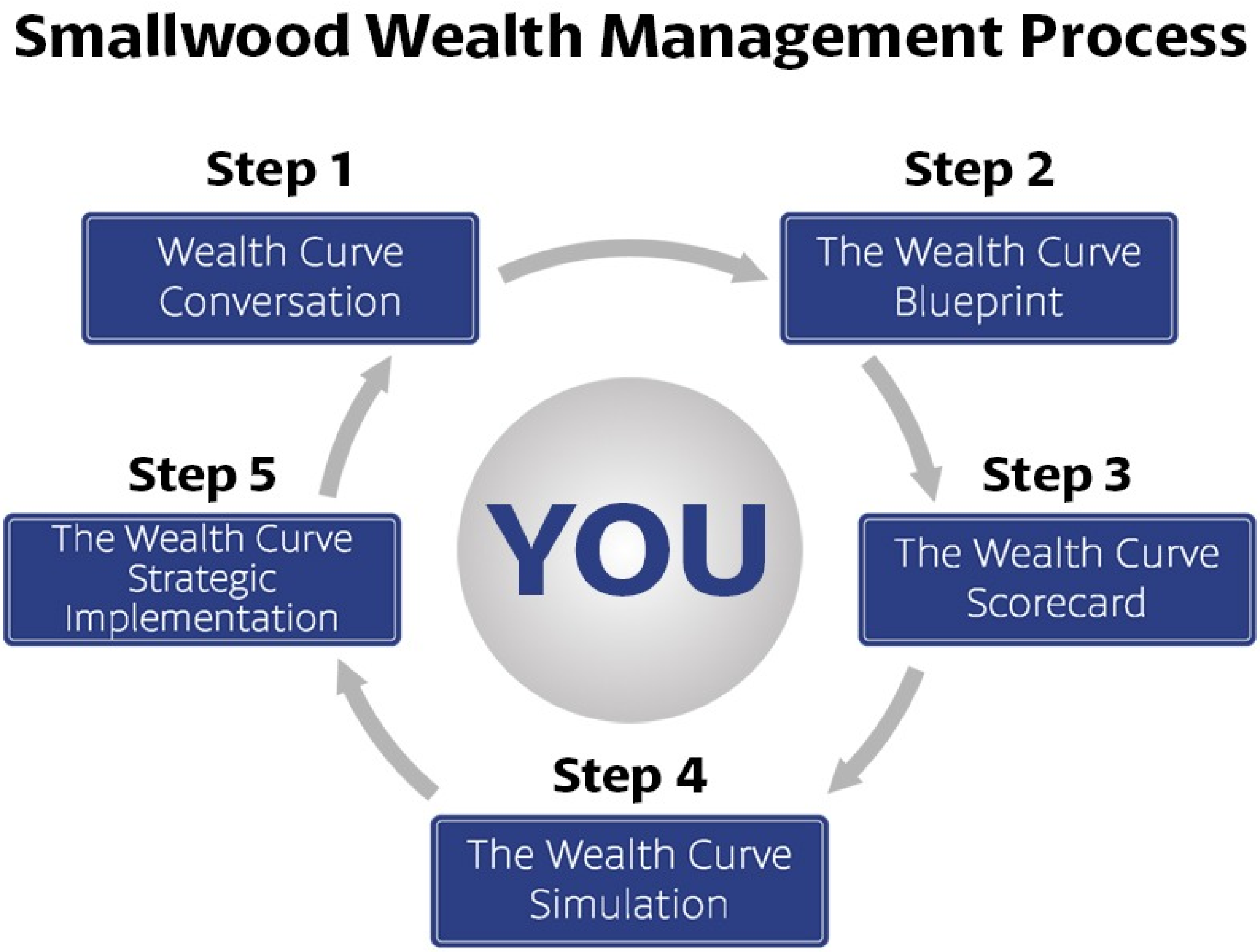
THE GOAL

Our goal is to help you develop financial strategies that attempt to reduce risk and taxes, accumulate more wealth, enhance retirement income, and pass more assets on to your family. Our focus is completely on you and your financial goals.

Financial Planning - The Big Picture

Financial Planning -The Big Picture

OUR PROCESS



The Wealth Curve Process Overview

The Smallwood Wealth Investment Management Process follows five main steps. The first step, **The Wealth Curve Conversation**, is a holistic approach and an in-depth discovery of your lifestyle, your financial situation, your risks and goals. We aggregate all the aspects of your current financial plan into one big picture, called **The Wealth Curve Blueprint**. It will show you the opportunities and deficiencies of your current plan. We move onto Step Three which is **The Wealth Curve Score Card**. This score card is a powerful visual tool that highlights where your plan is strong and where it needs some attention. For example, how will my plan change at X if I adjust Y. In step four we will run **The Wealth Curve Simulation**. Here we analyse your plan to show under which real-life scenarios your plan will perform strongly in and which your plan will perform more on the weak side. In essence, this is a stress-test of your plan. The final step is **The Wealth Curve**

Implementation. After carefully analyzing, simulating, and creating adjustments to your plan, it is now time to put it into action.

SMALLWOOD TEAM

John L. Smallwood, CFP®

Senior Wealth Advisor

Edward E. Bao Jr., CFP®, AIF®

Senior Wealth Advisor

Leanne Menzel

Client Services Administrator

Ellen Algokce

Client Relations Coordinator

Jennie Sherman

Insurance Director

Jennifer Duffy

Marketing Specialist

Christine Flynn

Client Implementation Concierge

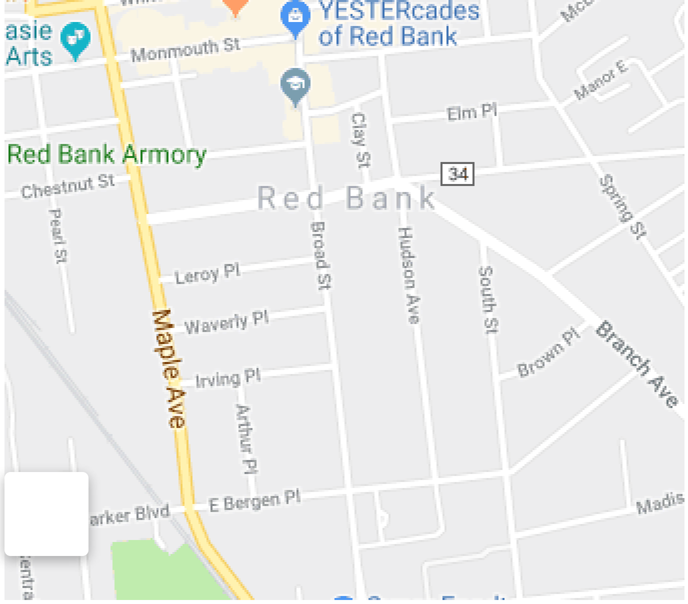
"We believe in looking at the big picture, we want to continually focus on that vision, and work with you to develop the right plan for today and tomorrow."

JOHN L. SMALLWOOD, CFP®

NEED TO TALK WITH SOMEONE

Contact Us Today

Simply fill out the form below and a member of our team will reach out to you shortly.



SMALLWOOD WEALTH MANAGEMENT
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First Name *	First Name *
Last Name *	Last Name *
Street Address	Street Address
City	City
State	State
Zip Code	Zip Code
Phone *	Phone *
Email *	Email *

Submit

Come & Connect With Us

Book an appointment

BrokerCheck – check the background of this investment professional >>

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