

PROCESS (HTTPS://WWW.BERNARDWEALTHPLANNING.COM/PROCESS/)

TEAM (HTTPS://WWW.BERNARDWEALTHPLANNING.COM/TEAM/)

OUR MISSION IS SIMPLE.

We assist in the creation, preservation, and management of wealth for our clients.

INSIGHT (HTTPS://WWW.BERNARDWEALTHPLANNING.COM/INSIGHT/)

OUR INVESTMENT PHILOSOPHY IS EVEN SIMPLER.

CONTACT

Our clients are what it's all about.

SEE OUR PROCESS

(HTTP://WWW.BERNARDWEALTHPLANNING.COM/PROCESS)

CHARLES SCHWAB

(HTTPS://CLIENT.SCHWAB.COM/LOGIN/SIGNON/CUSTOMERCENTERLOGIN.ASPX)

OUR TEAM APPROACH IS STRONG.

Our relationships are built with a solid foundation of trust and service.

EMONEY (HTTPS://WWW.BERNARDWEALTHPLANNING.COM/EMONEY/)
MEET THE TEAM
(HTTP://WWW.BERNARDWEALTHPLANNING.COM/TEAM)

Bernardo's investment strategy rests firmly — always — upon our client-centered philosophy. We use theme-driven tactical and non-correlated vehicles with broad diversification across multiple asset classes, combining passive and active management, as essential tools to help mitigate risk and maximize our clients' potential returns. Through the hiring of professional money managers, we are able to utilize some of the best investment minds in the industry. All these resources go to work for you, in service of one aim: to help achieve your goals.

OVERVIEW OF SERVICES

Retirement planning

Investment services and personal investing

Family needs planning

Business succession planning

Estate planning

FINANCIAL INSIGHTS



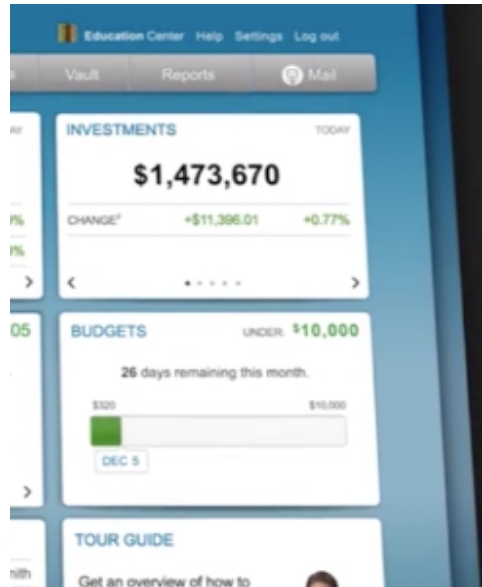
[\(https://www.bernardowealthplanning.com/insight/market-commentary-july-2019/\)](https://www.bernardowealthplanning.com/insight/market-commentary-july-2019/)

MARKET COMMENTARY - JULY 2019

(HTTPS://WWW.BERNARDOWEALTHPLANNING.COM/INSIGHT/MARKET-COMMENTARY-JULY-2019/)

Each month we highlight voices we respect from around the marketplace. Here's what they're saying: Events are changing rapidly, and that's why we are seeing higher levels of market volatility almost on a daily basis. If you could put aside the trade disputes for a...

EMX FROM EMONEY ADVISOR



We're excited to introduce emX from eMoney Advisor. More than just Bernardo's client portal, emX offers you a complete personal financial management website. It keeps your various banking, investment, and insurance accounts updated and organized, lets you manage your budgets and spending, and even helps us chart a path for your long-term-planning goals — all in one convenient online/mobile experience. Contact us to sign up.

[READ MORE \(/emoney/\)](#)

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SEND

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GET DIRECTIONS ([HTTPS://GOO.GL/MAPS/VOXJNVER2VK](https://goo.gl/maps/VOXJNVER2VK))

464 Main St. // Harleysville, PA 19438

(Parking is behind the building; follow GPS to 307 Broad St.)

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[Legal Disclosure \(/legal-disclosure/\)](#)

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