WealthShield

We put *investment* back into *investment* advisor.

THE FTSE DIVIDEND SELECT EQUAL WEIGHT INDEX SERIES HAS BEEN RELEASED!

In partnership with FTSE Russell, WealthShield has launched several new indices designed to measure the performance of US companies that have successfully increased their dividend payments over a period of 10 years. These indexes have been designed to provide a benchmark for investors looking to capture a concentrated portfolio of constituents demonstrating increased dividends and positive momentum.

VIEW THE FULL FACTSHEET NOW

Our Mission

WealthShield is an investment company designed to help our partners. Our belief is that investor psychology is the driving force behind markets. We have a unique strategy that gives you the potential to grow client wealth without having to suffer large market declines.

Coupled with our unique investment approach, our cutting-edge digital platform gives you the tools necessary to potentially add scale and efficiently grow and market your business. We build the platform around your needs and customize a solution to help you provide the optimal client experience and investment offering. The methods we employ create a behaviorally palatable portfolio customized for the unique needs of your clients.

Ultimately, our goal is to save you the time you need to focus on what is most important--your clients. Our virtual services, paired with our collaborative investment strategy, allow you to refocus your efforts and attention on delivering superior investment advice--that way you can get back to becoming a true *investment* advisor. Through our ongoing strategic partnership, we deliver you a consistent and reliable investment experience that will increase your potential to grow your client wealth in the long-term.

Outsourced CIO

WEALTHSHIELD

WealthShield allows you to outsource everything from asset management and portfolio customization to compliance and back office support, while focusing primarily on the relationship management aspect of your business. We provide access to the advanced technological tools necessary to facilitate an efficient operation, so advisors can focus more time on their clients and create a custom differentiation strategy for their portfolios. This level of efficiency and scale, coupled with our collaborative asset management strategies, enables you to focus on client support and the growth of your business in the long-term.

WHY WEALTHSHIELD

Customized

Every advisor has a different approach. With this in mind, we work with financial advisors in a customized manner to help them build an institutional, quality investment process.

Technology

We leverage modern technology to add scale and efficiency to our firms so that you can brand and promote

Integration

We become an integral team member to our partner firms, helping them grow their businesses and deepen client relationships in the long-term.

We seek to simplify all elements of your wealth management process to give you the time you need to focus on what is most important: *your clients*.

OUR PROCESS

WEALTHSHIELD

Strategize

We help you discover your investment philosophy and design a plan to create a customized, institutional quality asset management platform.

Execute

Manage

We help ensure that your investment approach runs smoothly to maintain existing relationships and attract new clients.

Our core belief is that investor psychology is the driving force behind markets. We have a unique strategy that helps you grow client

MEET THE TEAM

Clint Sorenson, CFA®, CMT®

CO-FOUNDER

Robert Leggett, CFA®, CFP®, JD®

CO-FOUNDER

David Stefanick, CFA®

DIRECTOR OF RESEARCH

Caroline Leggett

DIRECTOR OF MARKETING

Joe McQuaid

DIRECTOR OF BUSINESS DEVELOPMENT

Charles Petrie

DIRECTOR OF ENTERPRISE SOLUTIONS

Max Rockwell

RESEARCH ANALYST

Luke Vernon

RESEARCH ANALYST

OUR PARTNERS

PMC partners with WealthShield to provide comprehensive CIO support services that enable our clients to achieve superior client outcomes. With a highly equipped team of 40 research analysts and strategists, PMC provides WealthShield with additional expertise in capital markets assumptions, asset allocation, due diligence, risk analysis, and access to managers and products otherwise not available to our firm. Click below to learn more about the leading members of the PMC team.

PMC | ENVESTNET

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WE DISTRIBUTE A WEEKLY MARKET COMMENTARY EVERY MONDAY, A DAILY MARKET REPORT TUESDAY THROUGH FRIDAY, AND A WEEKLY FEATURED ARTICLE EVERY FRIDAY. HAVE QUESTIONS YOU WOULD LIKE TO BE COVERED IN THESE REPORTS? EMAIL CAROLINE@WEALTHSHIELD.CO TO SUBMIT YOUR REQUEST AND WE WILL BE SURE TO INCORPORATE IT!

email address

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From discovering your investment philosophy to implementing an intelligent portfolio we have you covered.

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Discover the WealthShield advantage today!

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