

A man with grey hair, wearing a dark blue suit jacket over a light-colored shirt, is smiling and looking towards the camera. The background is a blurred outdoor setting with green foliage and trees.

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## About Us (<https://www.schechterwealth.com/about-us/>)

- Our Client-first Culture (</about-us/#client-first>)
- Our History (</about-us/#history>)
- Meet Our Knowledge Experts (</about-us/#knowledge-experts>)

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- Your Objectives (</about-you>)
- Your Future (</about-you>)
- Your Wealth Planning (</about-you>)



## Investment Advisory

Strategies designed from our understanding and singular focus of what is best for your family.

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## Private Capital

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**SCHECHTER** **80** YEARS

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## OUR SERVICES

PORTFOLIO DESIGN & MANAGEMENT ([HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/SCHECHTER-INVESTMENT-ADVISORS/PORTFOLIO-DESIGN-MANAGEMENT/](https://www.schechterwealth.com/our-services/schechter-investment-advisors/portfolio-design-management/))

FINANCIAL PLANNING ([HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/SCHECHTER-INVESTMENT-ADVISORS/FINANCIAL-PLANNING/](https://www.schechterwealth.com/our-services/schechter-investment-advisors/financial-planning/))

[ESTATE PLANNING \(HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/SCHECHTER-INVESTMENT-ADVISORS/ESTATE-PLANNING/\)](https://www.schechterwealth.com/our-services/schechter-investment-advisors/estate-planning/)

[PRIVATE CAPITAL \(HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/PRIVATE-CAPITAL/\)](https://www.schechterwealth.com/our-services/private-capital/)

[LIFE INSURANCE \(HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/INSURANCE/LIFE-INSURANCE/\)](https://www.schechterwealth.com/our-services/insurance/life-insurance/)

[PRIVATE PLACEMENT LIFE INSURANCE & ANNUITIES \(HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/INSURANCE/PRIVATE-PLACEMENT-LIFE-INSURANCE-ANNUITIES/\)](https://www.schechterwealth.com/our-services/insurance/private-placement-life-insurance-annuities/)

[PREMIUM FINANCING \(HTTPS://WWW.SCHECHTERWEALTH.COM/PREMIUM-FINANCE/\)](https://www.schechterwealth.com/premium-finance/)

[DISABILITY INSURANCE \(HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/INSURANCE/DISABILITY-INSURANCE/\)](https://www.schechterwealth.com/our-services/insurance/disability-insurance/)

[LONG-TERM CARE \(HTTPS://WWW.SCHECHTERWEALTH.COM/OUR-SERVICES/INSURANCE/LONG-TERM-CARE/\)](https://www.schechterwealth.com/our-services/insurance/long-term-care/)

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