inlight
WEALTH

Client Login

Inlight wealth is an independent advisory firm focused on preserving and growing wealth, and simplifying our clients financial lives.

Our clients are leaders who have built their success through focus, drive and solid execution. The result is wealth that demands the same diligence and careful planning required for any successful business endeavor. We provide the expertise, focus and execution that enables our clients to delegate the work of managing their wealth, along with all of the complexity that grows up around it.

What We Stand For

We seek the best solutions to serve our clients. This best-of-breed mindset applies to decisions regarding investment options, custodians, technology, and outside legal and tax counsel.

Confidentiality

We strictly guard our client's and prospective client's information. This applies to any and all information, however it is communicated. We are serious about confidentiality.

Stability

We have long-term relationships with our clients that span multiple generations - Over time, we help our clients incorporate younger generations into their planning.

Fee-Only

We do not charge commissions or sell products nor do we accept compensation from third parties. We act as fiduciaries for our clients, putting their interests first.

Transparent

Our clients are well-informed, and equipped to make sound financial decisions. We provide detailed performance reports, and personalized updates. We meet with clients at a level of frequency that meets their needs.

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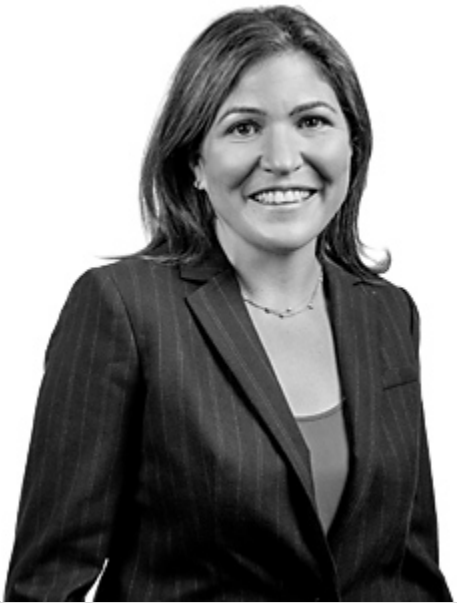
Jason Joffe, CFA, CFP®

Managing Partner, Chief Investment Officer

Jason was formerly a Managing Director at Morgan Stanley. During his seventeen year career, he led a wealth advisory practice and managed client portfolios on a discretionary basis. Jason is also a Managing Partner at West Elk Capital, LLC the sponsor of a private fund focused on long-term investments in small public companies.

Jason holds the Chartered Financial Analyst® designation and graduated Skidmore College, Cum Laude, with a B.A. in Biology.



Angie Dumler, CFP®

Partner, Client Service and Financial Planning

Angie has over 11 years of experience working with wealthy families. She was formerly with Morgan Stanley where her role included the construction and implementation of complex financial plans, and the overseeing of client service for the practice.

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Ben Esser

Partner, Operations and Family Office Services

Ben has over seventeen years of financial services experience. He was formerly a Portfolio Management Associate with Morgan Stanley where his role included portfolio analysis, overseeing operations for the practice, and working closely with wealthy families on all aspects of their financial lives. His experience includes the implementation of multi-faceted plans related to estate, tax, and investments, and the ongoing work of maintaining those plans. Previously, Ben worked in the Risk Group at ETrade as a Margin Analyst.

Ben has a B.S. in Management with a Concentration in Finance from Georgia Tech.

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Jamie Campbell

Head of Administration

Jamie has over 25 years of operations experience in the financial services industry, supporting the needs of high-net-worth clients. She is the go-to person for complex administrative work that requires organization and detailed and efficient follow-up.

Our Process

Develop a detailed financial picture and list of objectives

Analysis and construction of a customized plan

Collaboration to refine the plan

Our team takes on the implementation and administrative work

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Our solutions are customized and our services are as nuanced as our client's needs.

We organize our clients' financial pictures into comprehensive plans, provide reporting on all of their assets, and handle many of the administrative details involved in the implementation and maintenance of their plans.

We provide financial expertise - where necessary, we offer to bring in outside professionals to help our clients make well-informed decisions. To the extent that our clients already work with outside professionals, we seek to integrate into that group to add value.

The advice and planning we provide pertains to multiple aspects of our clients' financial lives.

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Client Login

Last Name

Email

Phone

Comment

SEND

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