WHITE OAK
WEALTH MANAGEMENT

CUSTOM WEALTH MANAGEMENT SOLUTIONS

ADVICE AND GUIDANCE THAT IS AS UNIQUE AS YOU ARE

A partner that understands your vision of financial success

Helping you achieve financial success is possible because we spend the time required to understand your thoughts and concerns about your money, future and family. Developing that attention to detail enables us to anticipate and solve problems before they occur so that you never have to worry.

Our clients rely on our advice and entrust us with the assets that will provide college educations for their children, secure retirements and a legacy for future generations. Our mission is to build and protect client wealth in all market cycles through individualized advice, delivered in clear, understandable terms.

EXPERTISE IN HOLISTIC SOLUTIONS

WE SPECIALIZE IN:

FINANCIAL PLANNING

—

Financial planning techniques and tax laws are constantly evolving. But where do you begin? How do you begin? You need a well-constructed financial plan as the blue print for your financial success. That's where we come in.

FINANCIAL PLANNING

INVESTMENT MANAGEMENT

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We design and manage portfolios that reflect the risk appropriate for each client. This ensures our clients are adequately compensated for the risks they take. Let us show you how to get paid.

INVESTMENT MANAGEMENT

TOTAL WEALTH SOLUTIONS

—

As the nuances of financial regulations and products become more complex; clients require an adviser who can provide guidance on a wide range of financial topics. Our commitment to deep client relationships uniquely positions us to provide advice on topics beyond financial planning and investments.

WEALTH MANAGEMENT

THE WHITE OAK DIFFERENCE

CLIENTS ARE UNDERSTOOD, CONNECTED AND INSPIRED

Everything we do centers on improving how we serve you. We are compensated only through the advice we provide. Our client-centric approach and fiduciary commitment allow us to remain focused on doing what is best for our clients. Period. White Oak is different because it has been designed and built to serve clients.

A FOCUS ON LISTENING

WE HEAR YOU

Enables us to develop an intimate understanding of your goals

HELPING YOU UNDERSTAND MORE

PUTTING YOU IN CONTROL

We work hard to ensure you understand your financial plan and

HOLISTIC SOLUTIONS

EXPERT ADVICE ON ALL THINGS FINANCIAL

We see beyond asset allocation diagrams and cash flow projections

INDIVIDUALIZED ATTENTION

WE'RE THINKING ABOUT YOUR MONEY EVEN WHEN YOU AREN'T

We carefully manage our growth to ensure we maintain the in control.

supports your goals.

service.

THE WHITE OAK DIFFERENCE

CLIENT SUCCESS STORIES

THE VALUE OF PERSONAL CLIENT RELATIONSHIPS

"Serving clients" are empty words if we can't showcase how clients benefit from their relationship with us.

WALL STREET EXECUTIVE IN

HEALTHCARE ADMINISTRATOR

INCENTIVE STOCK

PLANNING

—

We worked closely with a Wall Street executive to organize and consolidate multiple employer retirement plans into a cohesive investment strategy to meet her future financial goals...

MORE >

—

We designed and implemented an investment income strategy for a client who was months away from retirement and in need of a plan to meet significant retirement expenses. And we did it without annuities or insurance products.

MORE >

EXECUTIVE OF PUBLICLY TRADED COMPANY

—

An executive at a local public company needed to develop a strategy to execute options on his company stock to help fund college and retirement savings goals...

MORE >

MORE CLIENT SUCCESS STORIES

LOCATION

5850 Waterloo Road
Suite 140
Columbia, MD 21045

8:30am to 5:00pm | M-F

CONTACT WHITE OAK WEALTH MANAGEMENT

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Advisory services offered through Oakmont Wealth Advisory LLC, an SEC-registered investment advisory firm. White Oak Wealth Management may only conduct business with residents of the states for which they are properly registered.