Flat Fee Fiduciary Wealth Management

Earning Client Trust with Transparency,
Authenticity and Independence

Start your *vintage* experience here (/contact.html)

(571) 313-5125

ASSET MANAGEMENT

Utilizing individual Stocks, Funds, and Exchange traded Funds, we blend our unique risk managed, fee & tax efficient portfolio construction process with a client's existing holdings to produce productive financial outcomes. We are committed to Confidentiality and Clarity.

Managing Returns & Risk (/services/investment-management.html)

DIVORCE FINANCIAL ANALYSIS

For many couples the financial implications of divorce are an ongoing blend of confusion, frustration, anger, suspicion and most viscerally - fear. We are here to guide you and earn your trust.

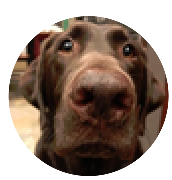
FINANCIAL PLANNING

"The best time to plant a tree was 20 years ago. The second-best time is now"! Drawing on our 30+ years of professional experience, we roll up our sleeves and blend your current situation with your future life desires to produce a road map to best guide you.

Your Unique Journey (/services/financial-planning.html)

WE ARE COMMITTED TO CONFIDENTIALITY AND CLARITY WITH ALL CLIENT COMMUNICATION.

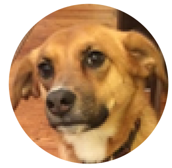
Your Piedmont Wealth Advisory Team (/about/advisory-team.html)



A message from Doug's Consigliere - Ralph

"After 24+ years of experiencing firsthand the mindset of Firm Revenue & Profits First that exists at the National Broker Dealers, Doug set out to establish a true Client Focused Wealth Advisory Firm – and he has achieved that with Piedmont Wealth Advisory"

Meet Doug (/about/advisory-team.html)



Advice from Jamie's Consigliere – Madden

"Blending his 5 years of experience with High Net Worth clients at Vanguard with his Certified Financial Planning designation, Jamie has always put the Clients financial interests first – both todays as well as their future needs"

Meet Jamie (/about/advisory-team.html)

26
NOV

The Birnie Fam bids Fenway Adieu!

I'll be channeling my inner John Updike for this effort.

read more (/our-blog/57-the-birnie-fam-bid-fenway-adieu.html)

2
NOV

Skip The Dip

Growing up in New England, we had several "regional" ice cream shops – many of which have faded into oblivion - unfortunately much like the NY Football Giants 2017 & 2018 seasons!

read more (/our-blog/56-skip-the-dip.html)

PIEDMONT Wealth Advisory

in

(https://www.linkedin.com/company/11299985/)

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*Email

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FUN FACTS

0%

INVESTORS

57 percent of investors have not set financial goals

0%

PEOPLE

67 percent of people have no financial plan.

0%

GUT INSTINCTS

77 percent of investors are making decisions on gut instinct.

0%

INVESTMENT KNOWLEDGE

20 percent of investors claim that their investment knowledge is very strong.

Client Login (https://investoraccess.rjf.com/)