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# Penta Wealth Management

I am excited to announce that Penta Wealth Management has moved on from UBS and we are now located at The Watermill Building at 800 South Street in Waltham, MA.

Penta Wealth Management will now have the independence to utilize an open architecture infrastructure, allowing us to select from the best of the best for our client service, technology, financial planning, and investment platforms. I am confident that this change will provide many positive benefits for your wealth management strategy and will enhance your overall client experience while providing a much more objective, multi-firm research platform that does not have any investment guidance biases.

In order to facilitate this change, you will be receiving a welcome email or package containing the necessary documents for the establishment and transfer of your accounts.

Please be on the lookout for communication from my team coming shortly with all of the paperwork and instructions for next steps.

Penta Wealth Management is dedicated to working with individuals and families to help them achieve their financial objectives. We provide individuals, families, and family businesses comprehensive and personalized wealth management solutions in what we call the **PWM Process**.

Industry statistics indicate that while nearly all Financial Advisors provide investment management services, only 7% offer ongoing assistance with the planning and management of the *non-investment parts* of your financial life.

Penta Wealth Management, on the other hand, takes a truly comprehensive approach to wealth management which we call the **PWM Process**:

- **Lifetime Financial Planning**
- **Investment Management**
- **Lifetime Financial Management**
- **Relationship Management**

Brokerage and Custody Services provided by Charles Schwab and Savior LLC