Secure Your Future

Welcome to Auctum Wealth, where our mission is to design and execute financial strategies that help individuals, families and business owners keep more of what they earn and earn more from what they keep.

We are more than investment advisors. We are wealth advisors - your advocates in every financial decision. We are more than licensed professionals with decades of advisory experience. We are business owners, investors, real estate owners and most importantly, leaders of our families relying on the same advice and expertise we provide to our clients. It's what drives the professionals at Auctum Wealth - we don't just dispense information, we advise our clients from the trenches - we have been there and done that.

Auctum Wealth was formed with one goal in mind - to bring an individualized approach and bespoke planning, once reserved for ultra-high net worth, to the mass-affluent. The professionals at Auctum Wealth utilize proven strategies to reduce, defer or even eliminate taxes associated with the sale of investment real estate, privately-held businesses, company stock and stock options, or all of the above. We work closely with your other trusted advisors to safeguard your assets from creditors and protect your estate from taxation.

As independent advisors and fiduciaries, we believe that complete transparency, actionable information, robust communication and evidenced-based investment decisions are integral parts of our process. To us, it is more than a legal obligation it is a moral duty. In fact, we live by the rule that we will never advise a client to follow our advice unless we have followed the same advice. If we do, we will tell you why.

Please browse our web site, where you'll find a wealth of information in the form of newsletter articles, calculators, and research reports. And then, please call when you are ready for the Auctum Wealth difference.

Contact Us

Please feel free to contact us with any questions.

Contact Us »

We are an independent financial services firm helping individuals create retirement strategies using a variety of insurance products to custom suit their needs and objectives.