(https://www.frischfinancial.com/)

Intelligent Wealth Management Tailored For Your Life

Caring, Trust & Expertise

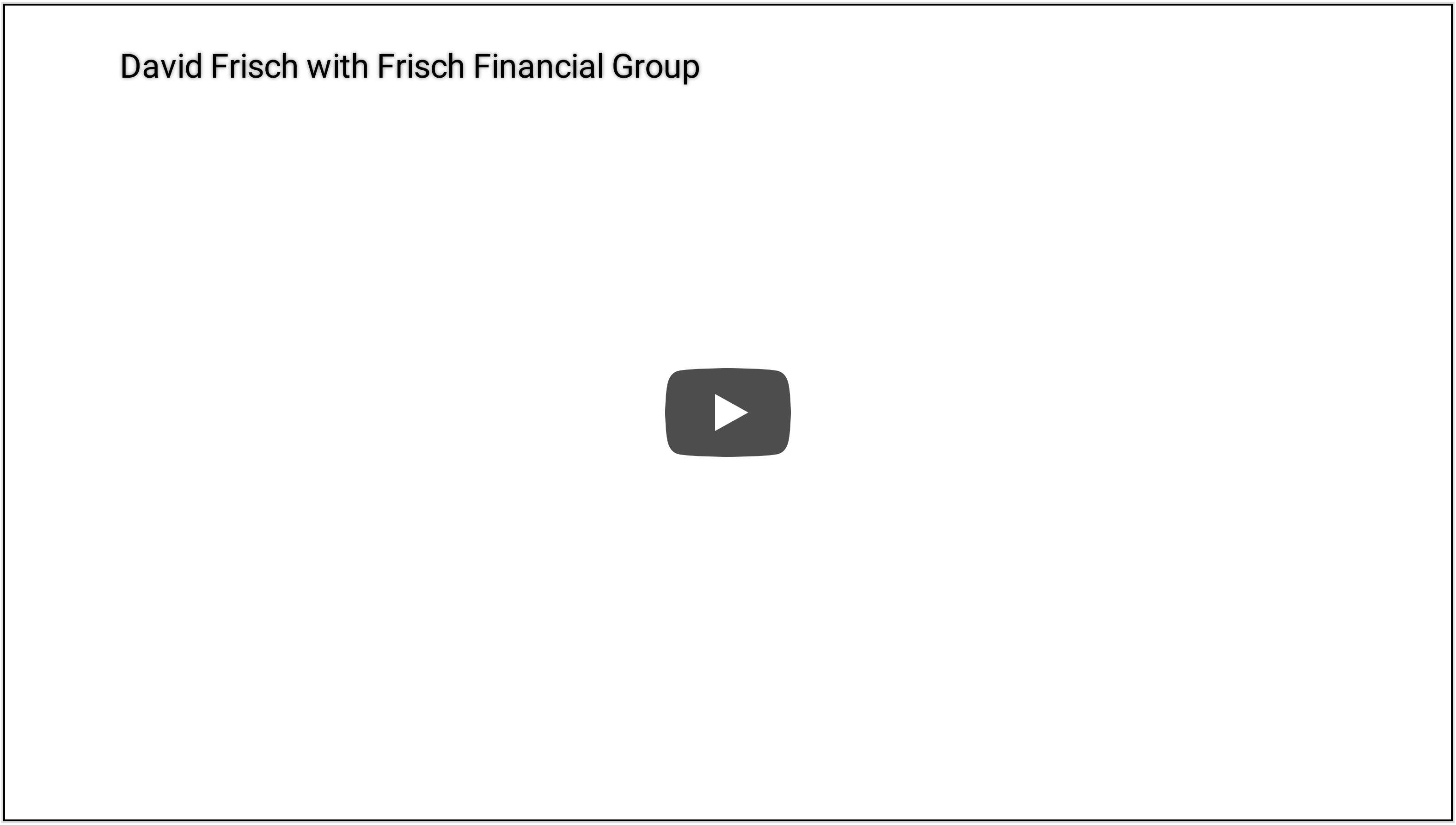
Our mission is to help our clients protect, preserve, and enhance their wealth. We achieve this by combining our investment management expertise with our financial planning services. Our co-management approach offers customization of portfolios and client involvement. As a fee only advisor, we do not sell any products and therefore, provide unbiased advice. Our clients always come first.

Investment Management (https://www.frischfinancial.com/our-services/investment-management)

Financial Planning (https://www.frischfinancial.com/our-services/financial-planning)

Frisch Financial was recently ranked as one of the top 9 advisory firms in New York by AdvisoryHQ and has received The Women's Choice Award® six years in a row (2013-2018).

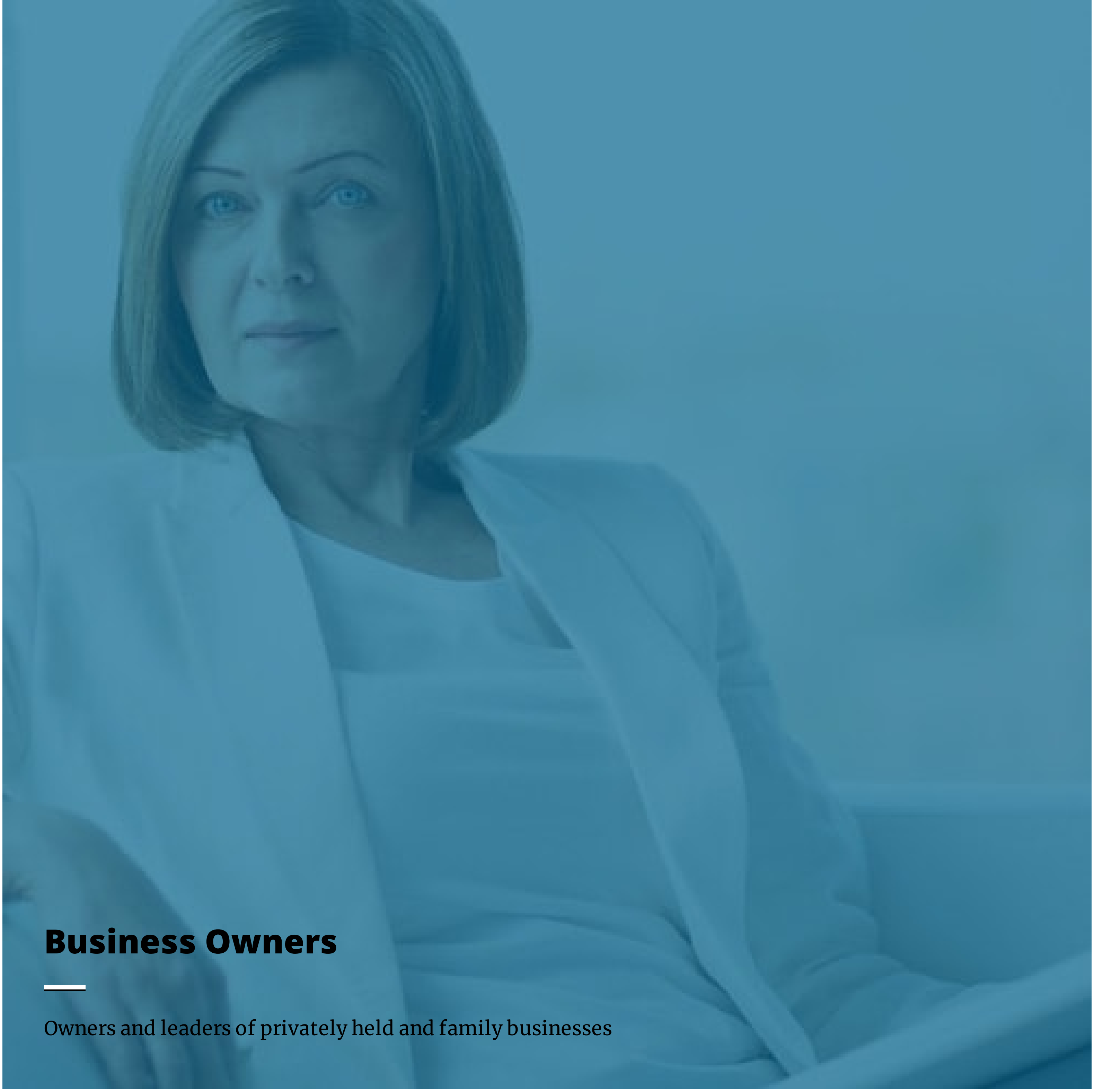
Reach Us (https://www.frischfinancial.com/contact)



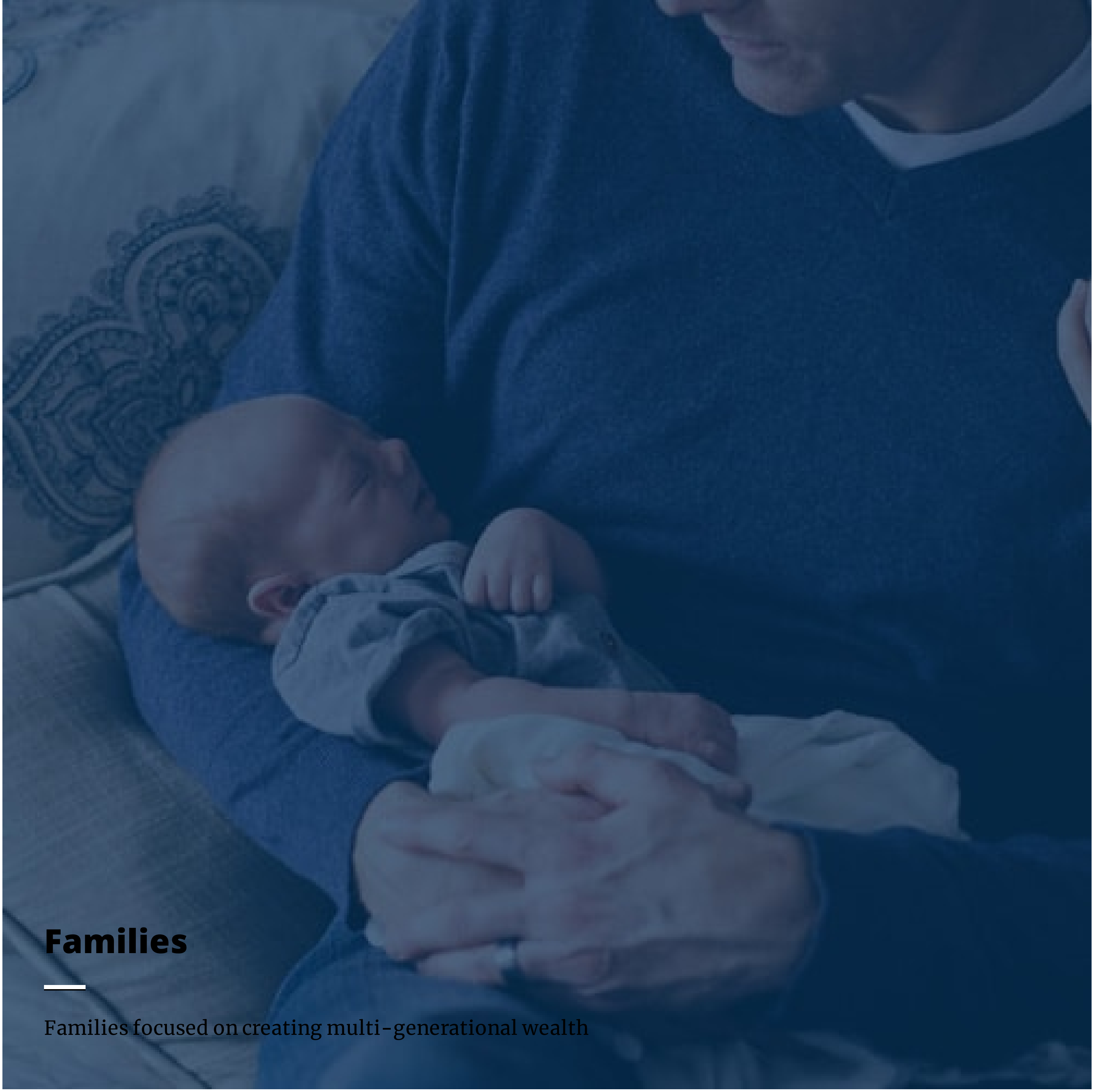
Who We Serve

We have long term relationships with our clients who value having a trusted partner to provide clarity and guidance for complex financial decisions. Many of our clients are senior business executives, business owners, and families who are committed to securing multi-generational wealth.

(/who-we-serve/executives)



(/who-we-serve/business-owners)



Families

Families focused on creating multi-generational wealth

(/who-we-serve/families)

Professional Wealth Management

You work hard, and life’s been good to you. You’re planning ahead, and want to know you’ll have the resources you need to provide the lifestyle you want - for you, and your family. We’ll keep you on the right path by combining investment strategies with a financial plan designed to preserve what you have, while achieving what you want. In an ever-changing world, we’re driven by what’s right for you.

Investment Management

Custom unbiased portfolio management based on client goals, risk tolerance, and tax.

Learn More (https://www.frischfinancial.com/our-services/investment-management)

Financial Planning

Comprehensive financial planning that is an ongoing process adjusted with life’s changes.

Learn More (https://www.frischfinancial.com/our-services/financial-planning)

How We Work Together

We will work together with you to define your goals and create an individualized plan to help you reach them.

Cares for Me Like Family

Helps me and my family understand our financial options, and works towards our goals, and is always on my side through ups and downs. They do the worrying for us and help us build and protect our legacy.

Creates a Plan that's Right for Me

Listens to and understands what I want to accomplish - for myself and my family. Makes sure I understand all the pieces of my financial picture. Provides unbiased opinions and recommendations based on what's right for me.

Trusted Financial Experts

Provides unbiased information and advice about all aspects of my financial picture. Works with me to develop a customized plan to reach my goals – and helps make sure I stay on track to meet those goals. Helps me make smart decisions now so I'll have the resources I need to meet future goals.

Latest News

Financial education is important to us. We share educational material that can help you make important financial decisions.

Retirement Planning for Women

June 5th, 2019

Frisch Ranked 2019 Best-in-State Wealth Advisor by Forbes & SHOOK Research

April 17th, 2019

Toughing It Out for a Good Cause

April 2nd, 2019

How 2019 Divorces are Affected by the New Tax Law

March 18th, 2019

Qualified Charitable Distributions

March 12th, 2019

Financial education matters!

2018 Income Taxes

March 9th, 2019

Financial education matters!

When you sign up to receive our Newsletter, we keep you informed with financial updates, educational articles, and breaking news.

First Name*

Type your first name

Last Name*

Type your last name

Email*

Type your email

Please verify your request*

I'm not a robot

reCAPTCHA
Privacy - Terms

Keep Me Informed!

Frisch Financial Group

Our mission is to help our clients protect, preserve, and enhance their wealth. We achieve this by combining our investment management expertise with our financial planning services. Our co-management approach offers customization of portfolios and client involvement. As a fee only advisor, we do not sell any products and therefore, provide unbiased advice. Our clients always come first.

Location

Frisch Financial
445 Broad Hollow Road, Suite 215 Melville, New York 11747

Reach Us

516.694.7900 (Long Island, NY)
813.639.7580 (Tampa, FL)
212.983.8444 (New York, NY)
914.696.0800 (White Plains, NY)
email@frischfinancial.com (mailto:email@frischfinancial.com)
(mailto:email@frischfinancial.com)