

# MaimonWealth

Cross-Border Planning and Wealth Management.

## Internationally Focused

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Israel | United States

MaimonWealth is an independent wealth management firm advising individuals and families in Israel, the United States and abroad. Our team specializes in customized cross-border financial advice and wealth management. We carefully analyse your circumstances and objectives to develop comprehensive strategies to address your unique set of needs.

Who We Help?

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## Our Clients

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We work with investors who are globally minded and are seeking wealth management strategies to elevate sustainable wealth and promote order in their affairs. Our clients may be planning for retirement, contemplating their legacy, or attempting to avoid costly cross-border pitfalls.

Our goal is to provide families with peace of mind and solutions that address their cross-border considerations.

### Global Investors



Our clients realize that working exclusively with locally focused firms can result in a more limited perspective and set of investment options.

[Learn more...](#)

### Expats



Especially after resettling in a new country, it's important to ensure that global equity strategies are complemented with adequate local-currency fixed income investments to meet anticipated liquidity needs.

[Learn more...](#)

### Americans



Once you have considered your equity, fixed income and currency strategies, as a US Expat, your circumstances will likely remain complicated by virtue of your ongoing US tax reporting obligation.

[Learn more...](#)

### Relocating Executives



Relocating to or from the States can add a further level of complexity that can be costly if not appropriately addressed ahead of your move.

[Learn more...](#)

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## Global Wealth Management

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Wealth Management with a Worldview

MaimonWealth was launched with the objective of providing best practices in global investment management to families in Israel and abroad. Working closely with our clients, we tailor our investment strategies to their specific needs, with special attention to their ongoing financial, tax, and estate planning considerations.

We offer customized investment management and portfolio strategies together with planning, advisory, and referral services, to support our clients in achieving their financial goals.

[Learn More](#)

## Cross-Border Expertise

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Wealth Management Israel & United States

For US families and other expats that resettle abroad, wealth management extends beyond the ordinary consideration of asset allocation and retirement planning. We specialize in helping US families address the interplay between their multiple tax and currency exposures.

We have a particular expertise in serving dual US/Israeli citizens and addressing their unique investment and financial planning needs. Typically, we help clients to devise asset and currency allocation plans across their US, Israel, and retirement accounts.

[Learn More](#)

## Our Strategy

Investment Strategies that Promote  
Balance in Your Life

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## Evidence-Based Approach

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We believe that achieving long-term financial balance requires a holistic approach that includes structuring financial resources to best maintain and grow wealth to meet life's objectives.

We are dedicated proponents of evidence-based, long-term investing.



## Why Work with an Advisor?

## Competence, Convenience, Coaching, Continuity

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[Contact Us](#)

The benefits of working with a financial advisor who offers competence, convenience, coaching, and continuity have

coordinate. This greatly enhances the value of a cross-border advisor who can provide comprehensive solutions.

Receive the latest news, insights, and analysis from Maimon Wealth.

Access our [Insights](#) and [Resource](#) page for financial information.



### Buffett's Secret Sauce

In his recent article, Wall Street Journal columnist Jason Zweig noted that Berkshire Hathaway's stock had under performed the S&P 500 Index over the 10 years ending in 2017, 7.7% versus 8.5%.

[Read more...](#)

## Let's Talk!

[Contact Us](#)

Whether you have a specific question, or you're interested in learning more

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Email \*

be in touch.

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Get in touch

[Client Login](#)