

# Trusted Financial Guidance

## 2nd Generation, Full-service Wealth Management Firm

Founded by Steven Kolinsky in 1982, Kolinsky Wealth Management (KWM) is a full-service wealth management firm serving high net worth individuals and business owners throughout the US. Based in Ramsey, NJ KWM provides a comprehensive range of financial solutions for their clients including Investment Advisory Services, Retirement Plan Design and Consulting, Wealth Transfer Planning, and Financial Planning. Steven is joined by his sons, Jason and Chad, ensuring a second generation at Kolinsky Wealth Management, LLC.

**KWM is an SEC registered investment advisor**

Knowledge,  
Experience,  
Accessibility, and  
Family Owned

**REQUEST A CONSULTATION**

## Our Numbers Speak for Themselves

Kolinsky Wealth Management has decades of experience, trust and dedication that can help your financial needs.

YEARS IN  
BUSINESS

GENERATION  
FIRM

YEARS AVERAGE  
CLIENT  
RELATIONSHIP

# Why Clients Choose to Work With KWM

- They want a diversified portfolio to reduce their risk
- Their current advisor does not offer alternative investments
- They want to reduce their income tax liability
- They want to defer capital gains tax, when selling business/investment properties
- They want that personal touch that mega firms can't offer
- Privately held firm owners want to work with entrepreneurial advisory firms

## What Makes Us Unique

Kolinsky Wealth Management focuses on long term relationships, not products. Once we have a full understanding of your finances, we construct a customized solution that suits your unique needs. We succeed by developing trusting relationships with our clients – working closely with attorneys, accountants, and other professionals to create personalized wealth management strategies tailored just for you.

We pride ourselves on an unwavering commitment to integrity, stability, long-term relationships, and the highest standards of service and performance. We look forward to helping you meet your financial goals.

The clients we serve are a remarkable diverse group. They range from successful entrepreneurs and business owners to high net worth families and corporate executives, all with a desire to nurture, grow and protect their assets. No matter where you fit into this spectrum you can be sure that our commitment remains to serve every client as a unique individual with a customized program to help them meet their financial goals.

## Investment Advisory Services

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## Retirement Planning for Privately Held Businesses

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