

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.

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(201) 474-4011

201-505-4879

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CLIENT DASHBOARD

KOIINSKY Wealth Management
Financial Guidance Since 1982

YEARS IN BUSINESS

GENERATION FIRM

CLIENT RELATIONSHIP

Why Clients Choose to Work With KWM

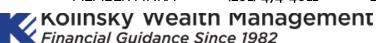
- They want a diversified portfolio to reduce their risk
- Their current advisor does not offer alternative investments
- They want to reduce their income tax liability
- They want to defer capital gains tax, when selling business/investment properties
- They want that personal touch that mega firms 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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This does not constitute an offer to buy or sell any security. Investments in securities are not suitable for all investors. Investment in any security may involve a high degree of risk and investors should review all "Risk Factors" before investing. Investors should perform their own due diligence before considering any investment. Past performance and/or forward looking statements are never an assurance of future results. Investment products, Insurance, and Annuity products are not FDIC Insured/Not Bank Guaranteed/Not Insured by any Federal Government Agency/May Lose Value. Kolinsky Wealth Management, LLC and American Portfolios Financial Services, Inc., are not affiliated.

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