The Means Guarantee

We take great pride in the quality of our advice, service and client experience.

If you aren't 100% satisfied with our services for any reason, we will return your fees*.

SCHEDULE A CONSULTATION

WHY US

WE ALWAYS ACT IN YOUR BEST INTEREST

As a Registered Investment Advisor, Federal law requires Means Wealth Management be held to a Fiduciary Standard. This means that the we …

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WE DON'T 'SELL' ANYTHING

As fiduciaries we do not sell any product, we simply consult on which strategy best suits your needs and then implement that s...

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WE INVEST WITH YOU

At Means Wealth Management, our employees invest using the same strategies we recommend to our clients. It is a long-held belie...

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QUALITY INVESTMENTS AND A DEPTH OF RESOURCES

As fiduciaries, we do not sell any investments or products. This ensures we avoid any conflict of interest. We simply advise you on your …

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OLDEST FIRM IN CENTRAL AND NORTHERN MAINE

Founded in 1935 by David G. Means, Means Wealth Management is now run by CEO Zachary Means, the third generation to lead the firm. The principles that hav...

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INDEPENDENT FIRM WITH GLOBAL CONNECTIONS

Means Wealth Management sets itself apart in many ways. First and foremost is that we are not beholden to shareholders or a large parent institut...

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FULLY TRANSPARENT FEES AND EXPENSES

There is a big difference between an honest advisor and a transparent one. According to Merriam-Web...

COMMUNITY INVOLVEMENT

From the very beginning it has been an objective of Means Wealth to impact not only the individual clients, but the community as a w...

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WEALTH MANAGEMENT

Whether you're an individual, family, business, or institution, you need a sustainable path for your financial future. At Means Wealth Management, we take a holistic view of your finances and provide detailed solutions suited to your goals.

All the aspects of your financial life are deeply interconnected—that's why all our services are, too. From investment strategies to retirement and estate planning, these elements work best when they work together. Our advisors consider all your interests to craft a comprehensive and cohesive plan.

MORE ABOUT WEALTH MANAGEMENT

RETIREMENT PLANNING

No matter your future financial needs, the path to that future needs to be sustainable. Small investments contributed periodically over a longer period of time can grow into a very healthy retirement. The power of compounding returns over the course of even just 20 years can be incredible. At Means Wealth Management, we take a holistic view of your finances and provide detailed solutions that are suited to your life, not just your goals.

MORE ABOUT RETIREMENT PLANNING

INSTITUTIONAL ASSET MANAGEMENT

As fiduciaries, we strongly believe in highly efficient, well-diversified portfolios built on the foundation of fundamental analysis, qualitative research and stringent asset allocation. Utilizing research by the most prestigious institutional wealth managers in the world, our portfolio construction is based on forward-looking asset class returns.

MORE ABOUT INSTITUTIONAL ASSET MANAGEMENT

Maine's Premier Wealth Management and Retirement Planning Firm

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