NWCM

OUR MISSION

To ensure Client financial success;

To act with the highest standard of fiduciary care; and

To use our influence as a business to effect positive, social outcomes within our community.

OUR FOCUS

To first understand the needs and circumstances of our Clients, and then to implement strategies that allow them to achieve their financial objectives, whether personal or corporate;

To mitigate our Clients' liability when a trustee or retirement plan sponsor; and

To educate the uninitiated about the necessity of, the challenges with, and the opportunities for investing for their future.

YOU HAVE UNIQUE FINANCIAL CONCERNS AND OBJECTIVES

We provide services tailored to fit your needs

FINANCIAL PLANNING

Our Private Clients have such financial goals as funding college educations, tax reduction, retirement income security, wealth accumulation, financial independence and estate planning. Given our Clients' differing circumstances, we develop personalized strategies to achieve their goals.

WEALTH MANAGEMENT

Our Private Clients have varied needs associated with wealth management: accumulation, distribution, preservation, and legacy. And all Clients share the same objective that is the core of our service: *invest money prudently to achieve attractive returns for an acceptable level of risk.*

INSTITUTIONAL ASSET MANAGEMENT

Our Clients include corporations and philanthropic organizations; their responsibility and liability is significant. Clients' concerns vary, as does the scope of investment and fiduciary services we provide.

RETIREMENT PLAN CONSULTING

Our Plan Sponsor Clients know that offering a company retirement plan is becoming increasingly complex and fraught with regulations and personal liability. We minimize these risks, and enhance the value of such an important employee benefit.

TRUST

We understand that our advice will impact you in significant ways. Your goals. Your money. Your future.

EXCELLENCE

With so much at stake, we believe "excellence" is the minimum standard for the service you expect.

SERVICE

Your circumstances are unique, and the counsel you seek requires individual attention and follow-through.

COMMUNICATION

Achieving your financial goals is a long-term process. You're busy. Our job is to keep you informed.

Who We Are

No matter how far you've come, or how far you yet plan to travel, you have tough decisions ahead. Decisions about savings and

Investment Professionals

We're career investment professionals. For nearly two decades, NWCM has been helping clients further their financial success.

investments. About guaranteeing income. About asset protection. Taxation. Philanthropy. Wealth transfer.

We're the people who can help you make informed, sound decisions.

We have the talent and resources to help you competently and prudently manage your investments.

Powerful Investment Tools

We leverage technology to provide the best possible service. We license third party software when it is effective. If off-the-shelf products can't deliver, we've developed software in-house.

Valuable Research

We subscribe to many third-party resources to aid our analysis, but there's no substitute for the in-house research we undertake when making judgements about your portfolio.

*Website designed by MadeULook Marketing & Design