

Wealth Management

As an Independent Advisor, we provide a holistic, client-centric approach to identify each clients' unique financial goals. We do this by building a relationship that allows us to get to know you and your family and what financial success means to you. From Investment Management to comprehensive Financial Planning, Whitney and Company's team is here to provide the support and guidance for even the most complex needs. Tailoring a plan specific for your needs while actively managing this plan towards your future.

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INVESTMENT MANAGEMENT

A personalized approach, creating an investment strategy for each client's long term goals, objectives and risk tolerance.

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WEALTH PLANNING

We are here to provide not only investment management results, but also comprehensive financial planning including, but not limited to; Retirement Planning, Insurance Planning, Social Security maximization as well as Estate, Charitable and Wealth Transfer Planning.

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401(K) CONSULTING

We partner with Fidelity Net Benefits to provide a robust 401(k) solution with personalized management at a low cost.

Why Choose Whitney & Company?

As an Independent Advisor we act as your trusted Fiduciary, we are here to serve not sell. We are not tied to a particular family of funds or investment products. We focus on building deep, long-lasting relationships with our clients. Getting to know each client, and their individual goals and objectives.

Our licensed professionals; including CFP, CFA and CPAs allow Whitney and Company to help with any and every financial need. Whether you need help with Retirement Planning, a Tax situation, Estate Planning or managing Multiple Assets, as an independent advisor, we have the ability to provide a wide array of wealth planning options tailored specifically to the needs of each client. Always keeping the best interest of the client first.

Contact Us Today

Investing and Retirement are complex situations. Contact us today and let our team of professionals help you through this process.

Contact Us

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