Financial Strategies for Living an Abundant Life

At Wealth Management Associates, Inc., we take great pride in helping you to plan your finances so that you can achieve the goals that truly bring meaning to your life.

Our Philosophy

Click Here (http://www.wealthmanage.net/our-philosophy/)

WELCOME TO WEALTH MANAGEMENT ASSOCIATES, INC.

Founded in 1999, Wealth Management Associates, Inc. has brought together advisors with extensive experience from some of the largest firms in the industry. They use this experience, their complete objectivity and independence, and access to state of the art resources and technology to help their clients achieve their financial goals.

The Best of Both Worlds

Since we are locally owned and operated, we focus our company expenses on things that directly benefit our clients. This discipline allows us to provide a very high level of personal service at a reasonable cost. With our strategic relationships with large financial institutions such as Fidelity Investments and Securities America, Inc., we can offer the full spectrum of investments and financial strength our clients need. Our clients enjoy the low cost and personal service of a small firm, with the safety and access to resources of a large firm: The best of both worlds.

Investment Advisory

Invest using all the tools in the toolbox (http://www.wealthmanage.net/wealth-management-advisory-account/) with an advisor acting as a fiduciary, putting your best interests first and foremost.

Retirement Income Planning

Low interest rates and market volatility are making a secure retirement more difficult. Our approach (http://www.wealthmanage.net/client-services/) can help you deal with the uncertainty.

Goal Driven Financial Planning

What is your financial goal? Chances are we have helped many others get there and have the tools to help you get there too. Let our experience (http://www.wealthmanage.net/client-services/) work for you.

OUR SERVICES

At Wealth Management Associates, Inc. our areas of expertise are:

Investment Management

Use the full range of investment vehicles, broadly diversify, monitor continuously, adjust when necessary, keep costs down, don't get greedy, don't get scared and track progress. We cannot control the markets, but we can help you control the little things that lead to long-term success.

Insurance

Sometimes you need a guarantee. It might be the guarantee that your family will have money if you die or the guarantee that a stream of income will not run out before you do. We can discuss the insurance products that offer these guarantees and provide competitive markets if one makes sense for you.

Retirement Income

Will your money run out before you do? We can help you answer that question and provide a plan to minimize the chances of it happening.

Education

The thought of paying for college is daunting. We have been through the process with many clients and can share with you the strategies for saving and paying for college that others have used successfully.

Small Business

Our advisors are entrepreneurs who are very aware of the concerns of small business owners. There are many unique retirement saving strategies that are available to small business owners. We understand small business and can help you balance your long-term investing goals with your current business needs.

Estate Planning

An estate plan needs to be documented by a competent attorney, but before you see an attorney to draw up the documents, we can discuss with you the pertinent issues that you need to address and strategies for addressing them. So, when you see an attorney you are more knowledgeable. We also work with several fine attorneys, whom we would be happy to recommend.

Estate Settlement

Probating an estate can be a sudden overwhelming responsibility. We can help you navigate the process.

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