

Managing Wealth for the Future You Want

Wechter Feldman Wealth Management has been guiding individuals, families, businesses, estates, and trusts toward their goals since 1984.

A full-service advisory firm, we offer comprehensive and integrated financial services in investment management and financial planning.

Clients work with our proven team of professionals who combine more than 85 years of industry experience.

**Every good financial decision begins with a
dialogue.
Start yours today with WFWM!**

**Our mission is based on a simple and far-reaching premise:
To assist our clients in achieving their goals.**

Professional Investment Advice Made Personal

Navigating your way to financial security takes careful preparation and robust, candid conversation with proven experts. That is why the heart of every client relationship at WFWM begins with a formal

exploration of your vision for the future, an assessment of your resources, and a clear understanding of your goals.

[Explore Our Investment Management Dialogue](#)

Turn Your Financial Plan into a Living Document

A financial plan builds a bridge between your current circumstances and your long-term goals. Tailored to individual needs and resources, a well-crafted financial plan evolves over time while staying in step with your most compelling objectives.

[Let the WFWM Team Show You How](#)

An Investment Process Designed Around You

1

1. Evaluate

Regularly assess and update your investment profile.

2

2. Allocate

Identify and maintain an appropriate asset allocation strategy.

3

3. Construct

Establish market sector allocation targets.

4

4. Recommend

Recommend specific investments.

5

5. Apply

Exercise risk reduction and monitoring strategies.

6

6. Administer

Administer your portfolio.

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