

WMS Advisors, LLC is a financial services company and Registered Investment Advisory firm with over 35 years experience in the financial industry. The firm provides a broad spectrum of services in investment management, business and comprehensive financial planning for individuals and small businesses. Our offices are located in Rockville, Maryland – a suburb of Washington, DC and in Charlotte, North Carolina.

An overview of our services includes:

- Investment Management
- Wealth Management
- Risk Management and Insurance Analysis
- Estates & Trusts – planning, maintenance and compliance services
- Retirement Plan design and management for businesses and individuals
- College planning and investment management

Our clients come from all across the country and include individuals as well as small business and non-profit organizations.



11300 Rockville Pike, Suite 800
Rockville, MD 20852

6135 Park South Drive, Suite 510
Charlotte, North Carolina 28210

General Information:

(888) 394-7804

Contact Us

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