



Integrated Wealth Management

Financial Planning. Investments. Taxes.

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A Wealth Planning Process Focused on You

At Wealth Health, our services are designed to simplify the complex and daunting challenges of managing your personal finances. We offer affluent individuals a solution to coordinating financial management among multiple advisors. Wealth Health enables you to centralize financial planning and wealth management at one highly focused, objective and experienced resource.

[Learn more about our services \(/IntegratedWealthManagement\)](#)



CLIENT ACCESS

Wealth Health's Secure Client Website (<https://secure.wealthhealthllc.com/>)

Wealth Health Alpha Strategy Website (<https://wealthhealth.crystaltools.com/home>)

Wealth Health clients enjoy online access to their accounts, quarterly reports and other secure documents. Our "Account Access" view allows clients to see their investment portfolio details such as daily investment balances, allocations, unrealized gains and losses, and transactions history. Our "Document Center" allows clients to see their personal financial documents in one secure location.

If you don't have a login to Wealth Health's Secure Client Website and would like one please contact us (/Office).



READ MARKET COMMENTARY

Following a tumultuous end to 2018, stocks, bonds and virtually every other asset class rebounded this year, recovering most of the losses in the process. Positive remarks from Federal Reserve Chairman Powell regarding rate hike expectations eased markets concerns about a contracting monetary policy and spurred a broad rally across world markets. Concurrently, a record \$900 billion was injected into the Chinese economy by the PBOC (People's Bank of China) to stimulate real estate and manufacturing activity while offsetting trade constrictions brought on by US tariffs.

In addition, there was yet another form of stimulus that was also working behind the scenes throughout 2018, this was in the form of a record \$811 billion in stock buybacks.

Continue Reading our
Latest Market Commentary (</Content/PDFs/Newsletter-04-30-2019.pdf>)



ACCOLADES

Wealth Health Makes Financial Advisor Magazine's list of the Top 50 Fastest Growing Firms in the Nation for the 2nd Straight Year



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See All Accolades (/OurAccolades)

TOP 50 FASTEST-GROWING FIRMS

RANK	FIRM	2014 REVENUE	2015 REVENUE	% CHG
1	Capital Financial Services	\$1,000,000	\$1,000,000	0%
2	Financial Planning Resources	\$1,000,000	\$1,000,000	0%
3	Financial Planning Solutions	\$1,000,000	\$1,000,000	0%
4	Financial Planning Systems	\$1,000,000	\$1,000,000	0%
5	Financial Planning Tools	\$1,000,000	\$1,000,000	0%
6	Financial Planning Software	\$1,000,000	\$1,000,000	0%
7	Financial Planning Services	\$1,000,000	\$1,000,000	0%
8	Financial Planning Consultants	\$1,000,000	\$1,000,000	0%
9	Financial Planning Advisors	\$1,000,000	\$1,000,000	0%
10	Financial Planning Experts	\$1,000,000	\$1,000,000	0%
11	Financial Planning Specialists	\$1,000,000	\$1,000,000	0%
12	Financial Planning Strategists	\$1,000,000	\$1,000,000	0%
13	Financial Planning Analysts	\$1,000,000	\$1,000,000	0%
14	Financial Planning Researchers	\$1,000,000	\$1,000,000	0%
15	Financial Planning Writers	\$1,000,000	\$1,000,000	0%
16	Financial Planning Editors	\$1,000,000	\$1,000,000	0%
17	Financial Planning Publishers	\$1,000,000	\$1,000,000	0%
18	Financial Planning Distributors	\$1,000,000	\$1,000,000	0%
19	Financial Planning Retailers	\$1,000,000	\$1,000,000	0%
20	Financial Planning Wholesalers	\$1,000,000	\$1,000,000	0%
21	Financial Planning Importers	\$1,000,000	\$1,000,000	0%
22	Financial Planning Exporters	\$1,000,000	\$1,000,000	0%
23	Financial Planning Manufacturers	\$1,000,000	\$1,000,000	0%
24	Financial Planning Suppliers	\$1,000,000	\$1,000,000	0%
25	Financial Planning Contractors	\$1,000,000	\$1,000,000	0%
26	Financial Planning Engineers	\$1,000,000	\$1,000,000	0%
27	Financial Planning Architects	\$1,000,000	\$1,000,000	0%
28	Financial Planning Interiors	\$1,000,000	\$1,000,000	0%
29	Financial Planning Landscapers	\$1,000,000	\$1,000,000	0%
30	Financial Planning Gardeners	\$1,000,000	\$1,000,000	0%
31	Financial Planning Painters	\$1,000,000	\$1,000,000	0%
32	Financial Planning Plumbers	\$1,000,000	\$1,000,000	0%
33	Financial Planning Electricians	\$1,000,000	\$1,000,000	0%
34	Financial Planning HVAC	\$1,000,000	\$1,000,000	0%
35	Financial Planning Roofers	\$1,000,000	\$1,000,000	0%
36	Financial Planning Siding	\$1,000,000	\$1,000,000	0%
37	Financial Planning Windows	\$1,000,000	\$1,000,000	0%
38	Financial Planning Doors	\$1,000,000	\$1,000,000	0%
39	Financial Planning Locksmiths	\$1,000,000	\$1,000,000	0%
40	Financial Planning Pest Control	\$1,000,000	\$1,000,000	0%
41	Financial Planning Termite	\$1,000,000	\$1,000,000	0%
42	Financial Planning Mold	\$1,000,000	\$1,000,000	0%
43	Financial Planning Water	\$1,000,000	\$1,000,000	0%
44	Financial Planning Sewer	\$1,000,000	\$1,000,000	0%
45	Financial Planning Foundation	\$1,000,000	\$1,000,000	0%
46	Financial Planning Driveways	\$1,000,000	\$1,000,000	0%
47	Financial Planning Patios	\$1,000,000	\$1,000,000	0%
48	Financial Planning Decks	\$1,000,000	\$1,000,000	0%
49	Financial Planning Porches	\$1,000,000	\$1,000,000	0%
50	Financial Planning Stairs	\$1,000,000	\$1,000,000	0%

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