VanceGray
WEALTH MANAGEMENT INC

Maine Financial Advisors & Wealth Management Professionals

We are a Maine based firm of financial advisors, wealth management consultants, and retirement planning professionals. We have offices in Bangor, Maine and Ellsworth, Maine.

At VanceGray Wealth Management, we work personally and intently to enhance the lives of our clients. As professional wealth managers, our bottom line is met when our clients achieve their long-term financial goals. Yet we also believe our clients should enjoy the two priceless assets that flow from wise financial management: peace of mind and confidence in the future. Together—helping clients reach their long-term goals and enjoy the process—is our mission and our passion.

> ***We want our clients to know they can trust us to be there – to answer questions and provide solid advice – regardless of what's going on in the market.***

The Best Advice Starts with Listening

At VanceGray Wealth Management, we believe excellent financial counsel never starts by talking. It starts by listening. Through a detailed information gathering and goal-setting process, VanceGray advisors help each client create a comprehensive financial strategy to fit his or her unique situation, integrating the disciplines of investment management and financial planning in order to deliver sound, tailored solutions. In the process, we strive to provide not only the best possible advice, but communicate options in a way that is also straight-forward and understandable.

Excellence is not an Act but a Habit

Our clients have worked very hard for their money. At VanceGray Wealth Management, we specialize in making their money work harder for them. VanceGray Wealth Management Incuses a disciplined investment approach consistent with procedures of "best practices" models. This includes the use of investment approach consistent with procedures of "best practices" models. This includes the use of customized rebalancing strategies pertinent to an individual's needs and tolerances. Every investment recommendation we make is grounded in the time horizon and risk tolerance of our clients. No decision is made without carefully considering the impact at that time, now and 5, 10, or 15 years down the road.

Success Grows from Good Decisions

VanceGray Wealth Management is here to assist anyone wishing to grow his/her wealth. We specialize in the needs of retirees or seniors who need help understanding the complicated world of investments. We take particular pride in assisting those who need regular help deciphering the intricacies of a solid investment strategy. We often help small business owners create succession plans and employee retirement programs. VanceGray provides estate counsel for many clients with highly appreciated assets. We facilitate charitable/non-profit organization funding and trust advisory, and most of all, we help people who want to know that they are doing the right thing with their money and feel good about what they're doing.

Smart Wealth Management isn't Black and White—it's Gray

Like our clients, we know that while diligent wealth management is sometimes hard work, it's also rewarding adventure. VanceGray Wealth Management clients trust us for answers along the journey, often in relationships that cross generations. If you're not already a part of our growing family of clients, we invite you to schedule a visit to further discuss how we can help you meet your financial goals.