Specializing in Wealth Accumulation and Wealth Preservation

Lifetime Wealth Management, P.C. operates with one singular objective: to provide superior financial advice and to foster lasting relationships with our clients. Each relationship has specific goals and dreams and being a part of achieving both results in a true love for what we do. Our success is a result of our quality of clientele, not from the quantity of clients.

OUR PROCESS

Step 1:
Identify Needs

Step 2:
Client Discovery

Gather necessary data and identify client objectives through client questionnaire.

Step 3:
Financial Evaluation

Assets vs. Liabilities

Cash Inflow vs. Outflows

Needs vs. Wants

Step 4:
Develop Plan

Develop and implement client’s financial plan.

Step 5:
Ongoing Review

Assets vs. Liabilities

Cash Inflow vs. Outflows

Needs vs. Wants

Wealth Management

HELPING YOU CREATE AND DEFINE YOUR LEGACY

OUR SERVICES (/SERVICES)

Tax Advisors

VISIT SITE (HTTP://WWW.LIFETIMETA.COM/)

Insurance Services

PROTECTING YOUR ASSETS AND INSURING YOUR LEGACY

VISIT SITE (HTTP://WWW.LIFETIMEIS.COM/)

Jason Potts

President/CEO

New clients come to us from our marketing efforts, but most are a result of referrals. Our clients see that we are passionate about what we do, and chances are you are reading this because you were referred to us by one of our clients. For those of you who have granted us the ultimate compliment of referring us — we thank you.

For those of you who have yet to experience what we have to offer as your wealth management firm of choice, we encourage you to give us a call. We believe that our knowledge and experience result in exceptional service and advice. Our success comes from the quality of our clientele, not from the quantity of clients. We specialize in learning who you are and what your needs and expectations are. To start strong requires a solid understanding from both parties and our proprietary process and excellent communication leads us to a successful union. We love being the expert for all of our client's financial needs.

I once heard someone say, "Life is short, live a good life." I cannot think of a better motto by which to live. We are passionate in our roles as financial advisors and truly feel blessed to love what we do. It is our privilege to assist our clients in accepting this motto as their own, while taking the helm, as we guide them to financial success.

Contact Us

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Other Lifetime Companies

Lifetime Tax Advisors (http://lifetimeta.com)

Lifetime Insurance Services (http://lifetimeis.com)