Welcome to RMR Wealth Management, LLC

RMR Wealth Management, LLC is an SEC-registered investment advisory firm that provides high net worth individuals and institutional clients with comprehensive and personalized wealth management planning expertise. RMR Wealth Management was founded by three senior investment officers with over 50 years of combined financial services and wealth management experience.

Our investment approach is built on identifying each client’s unique objectives and establishing a customized investment plan to meet them. Our independent financial advisors address each critical step in the investment management process including: goal setting and risk/return profiling; asset allocation modeling and execution; rigorous investment selection, monitoring and reporting. We work with you to develop the foundation for a long-term strategy designed to meet your specific wealth management needs.

The first step is the analysis of your goals and requirements. What is your overall financial picture? What are your short and long term investment objectives? What are your current and future cash flow needs? What is your comfort level with respect to risk and yield? The answers to these fundamental wealth management questions provide the primary building blocks for professionally and responsibly managing your assets.

RMR Wealth Management works with you through every step of the process in an open and transparent way, and every investment decision we make is determined by and geared toward the strategy that we design and implement together. We provide wealth management services tailored to your financial needs. At all times, we maintain the flexibility to alter the plan should circumstances change and require us to modify the strategy. We understand and appreciate our role as financial advisors. As partners in the wealth management process, we work hand in hand with you to address both the financial opportunities and challenges along the way.

RMR Wealth Management, LLC is a SEC-registered investment advisor.
Securities offered through Dinosaur Securities, LLC a member of FINRA, SIPC & NFA.