BARON WEALTH MANAGEMENT

Decidedly Different

“Attitude is a choice. Happiness is a choice. Optimism is a choice. Kindness is a choice. Giving is a choice. Respect is a choice. Whatever choice you make makes you. Choose wisely." - Roy T. Bennett

Client Login

Meet

Team, Purpose & Core Values

Review

Personal Financial Planning

Review

Corporate Sponsored Financial Planning

Decide

Are We a Good Fit?

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Are We a Good Fit?

At Baron Wealth Management, our approach is ***Decidedly Different***.

Whether you are considering changing firms, or you are seeking to build a long-term relationship with an advisor who can help you reach your financial goals, please take a minute to get to know us with our videos below. You will find a fresh approach to Comprehensive Wealth Management that is decidedly different than other firms in the financial services industry.

Meet Our Leadership Team

Beth A. Zilka

President

Beth earned her Bachelor of Arts degree with an emphasis in Finance from Hillsdale College and her Masters of Business Administration (MBA) with an emphasis in Accounting from Walsh College. Beth joined Nantucket Capital Management, LLC and became the Managing Director of their private equity business where she managed communications with investors and performed due diligence on prospective and current private equity fund investments. She assisted the founding partner in performing due diligence on hedge funds and was the Financial Operations Principal of the firm's broker dealer. Wanting to provide comprehensive financial advising for clients, Beth joined The Ayco Company, LP (A Goldman Sachs Company) in 2003. She focused her career on assisting CEOs, CFOs, and other **(Read More)**

Sandra Kerr

Senior Wealth Advisor

Sandra has more than 25 years of experience in financial planning and wealth management. She began her financial planning career in 1993 when she joined Cigna Financial Advisors (CFA) as a registered representative. Known for its complex, ongoing, and rigorous training in the area of Comprehensive Wealth and Estate Planning for business owners and corporate executives, Sandra immersed herself in this opportunity and experience, and began building her practice.

In 1997, CFA was purchased by Lincoln Life. In 2006, Sandra joined Vision Capital Partners, an independent wealth advising firm, where she continued **(Read More)**

Crystal Steinhour

Operations Manager

Crystal obtained her Associates of Applied Science degree in Accounting and graduated from Central Michigan University with her Bachelor of Business Administration degree in Industrial Organization. Her experience includes 7 years in the manufacturing industry and 9 years in the banking/financial industry where she and Beth first met.

Crystal values the Baron Wealth gold standard of service for every client. She is committed to serving the growing firm with exceptional tax and personal financial management.

A native of Sterling Heights, Michigan, Crystal has been a resident of Macomb County, Michigan for more than 30 years. In her free time, Crystal enjoys spending time with **(Read More)**

Our Mission: Empower others to meet the challenges of a well lived life.

Core Values:

Ownership – We are accountable; we do not need to be micromanaged. We understand that all tasks are important and that we must be responsible for our own work.

Service Oriented – Our expectation is that every client experience meets a gold standard.

Hardworking – We care. We genuinely care about the well-being and long-term success of our colleagues and each of our clients. We work hard and focus our attention on achieving and exceeding expected results.

Knowledgeable – Gaining and sharing knowledge is part of who we are. We are lifelong learners who have a passion for educating others. We truly enjoy translating data into information that our clients can apply to make better decisions.

Teamwork – We take a team approach to our work. We understand our strengths and the importance of the role we play on the team. We do not have silos; we thrive on collaborating and working together. Constant communication helps us create a complete client relationship.

Baron's Symbol Story

A Sequence of Relevant Shape Development

The complexity and involvement of financial investments, tax planning, retirement, estate, insurance and benefit planning can be fragmented and confusing...

Baron Wealth pulls it all together into a single cohesive picture, delivering clear, objective financial advice and comprehensive planning solutions. Tailored, objective, organized.

Baron Wealth Management brings confidence to your complete financial portrait. Clear, unified, all in order, easy to understand and comprehensively managed.

A shield speaks to security, family, tradition, protection and strength. All attributes at the core of what Baron Wealth is all about.

Personal Financial Planning

We provide a single point of contact for all financial needs while taking a team approach to client service. At Baron Wealth Management, we have a strong team in place to ensure that client needs are addressed timely and close personal attention is part of every request and every client meeting.

Our approach is holistic and extremely comprehensive. Baron clients rely on us for guidance and support when it comes to not only traditional financial decisions, but also decisions involving taxation, insurance, healthcare, estate planning, employment plans/packages/offers, family matters, real estate, business purchases/divestitures/investments, and more. We are the family CFO, the trusted advisor in all matters relating to planning for a well lived life, for every member of the family.

Review

Corporate Sponsored Financial Planning

We collaborate with Human Resources to align and integrate company benefits to create a holistic comprehensive financial plan for the employee. At Baron Wealth Management, we provide a complete understanding of your company's benefit options and the clarity to choose those that afford the greatest advantages, while keeping in line with the employee's overall goals for a well lived life.

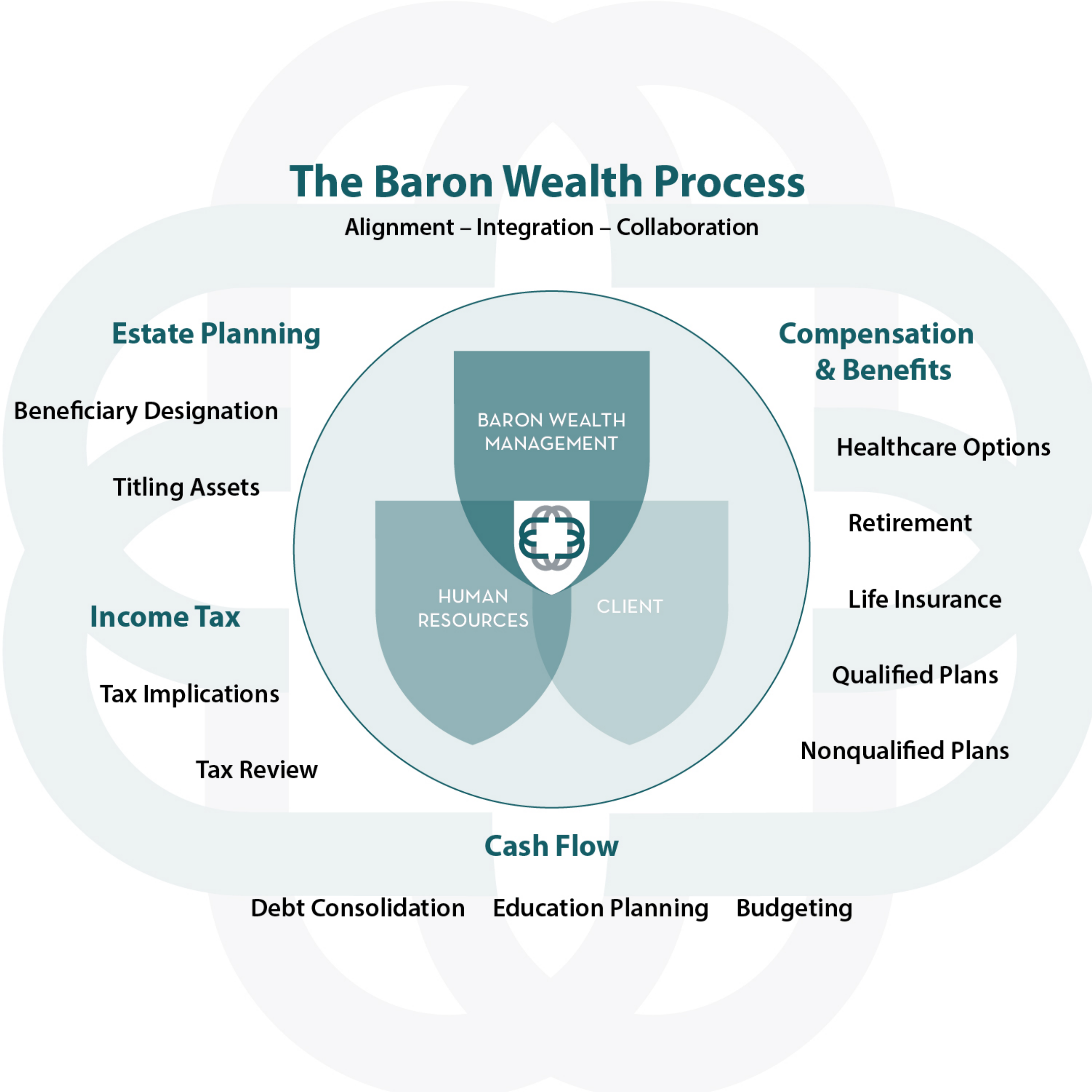
Our Value Proposition for Employer and Employee:

•Reduced employee stress from financial pressures, freeing them up to fully employ their talent and productivity.

•Deepened employee loyalty and appreciation for the company and benefits provided.

•Ease of compliance with company policies and procedures.

•Holistic comprehensive financial advice that few companies provide.

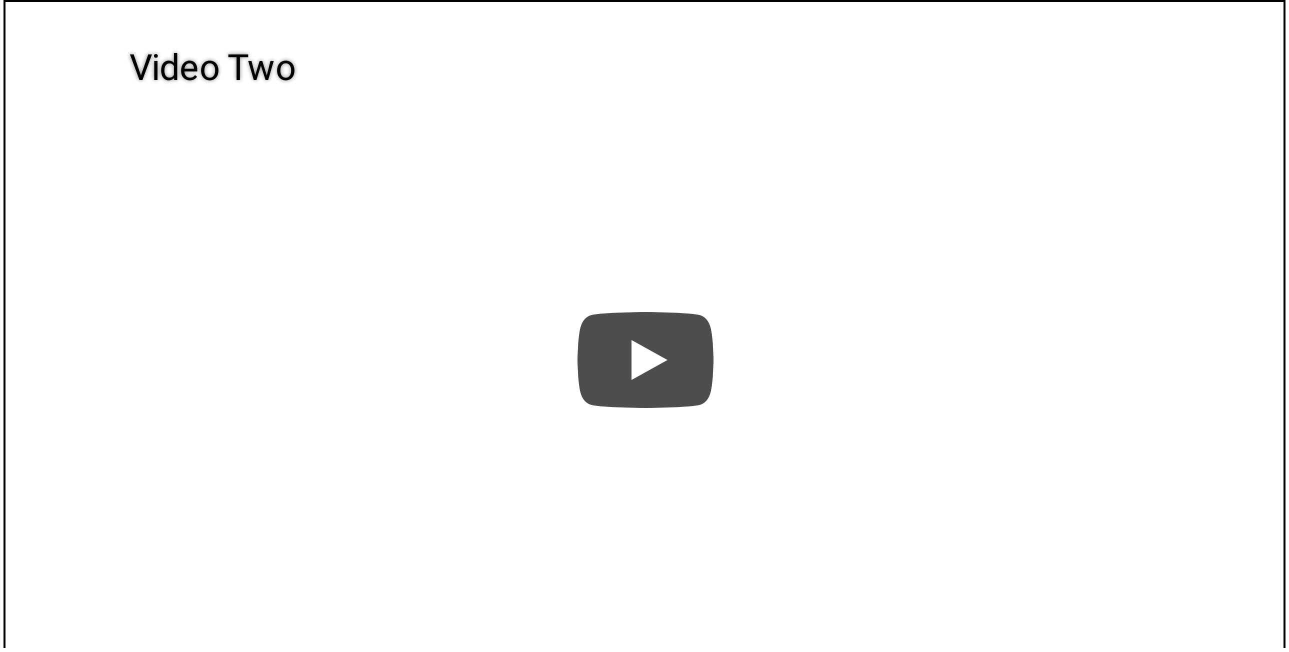

The Baron Wealth Process
Alignment – Integration – Collaboration
Estate Planning
Beneficiary Designation
Titling Assets
Income Tax
Tax Implications
Tax Review
Compensation & Benefits
Healthcare Options
Retirement
Life Insurance
Qualified Plans
Nonqualified Plans
BARON WEALTH MANAGEMENT
HUMAN RESOURCES
CLIENT
Cash Flow
Debt Consolidation
Education Planning
Budgeting

Decide

Are We a Good Fit?

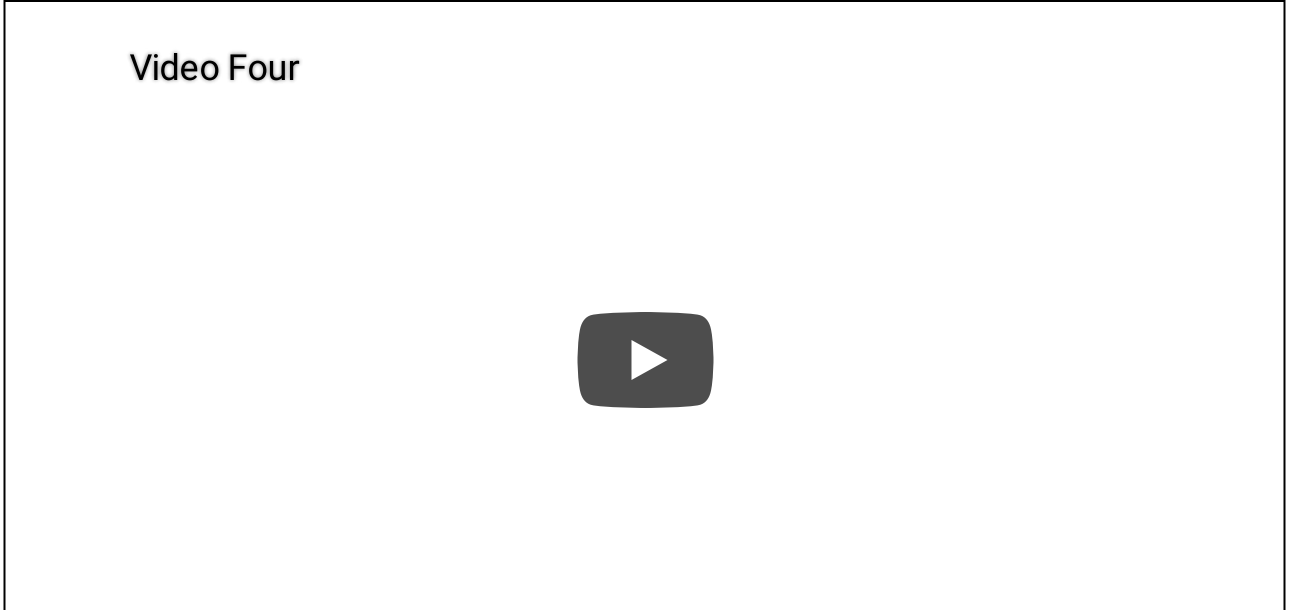
Beth Zilka set out to create a wealth management firm that was ***decidedly different*** from most in the industry. Beginning her career as an analyst, Beth focused on manager due diligence and risk. This provides a unique perspective to comprehensive wealth management that is leveraged for the benefit of all Baron Wealth clients. Get to know Beth, Baron Wealth Management, and the philosophy behind the comprehensive approach the team at Baron provides, by viewing these videos:

Comprehensive Approach



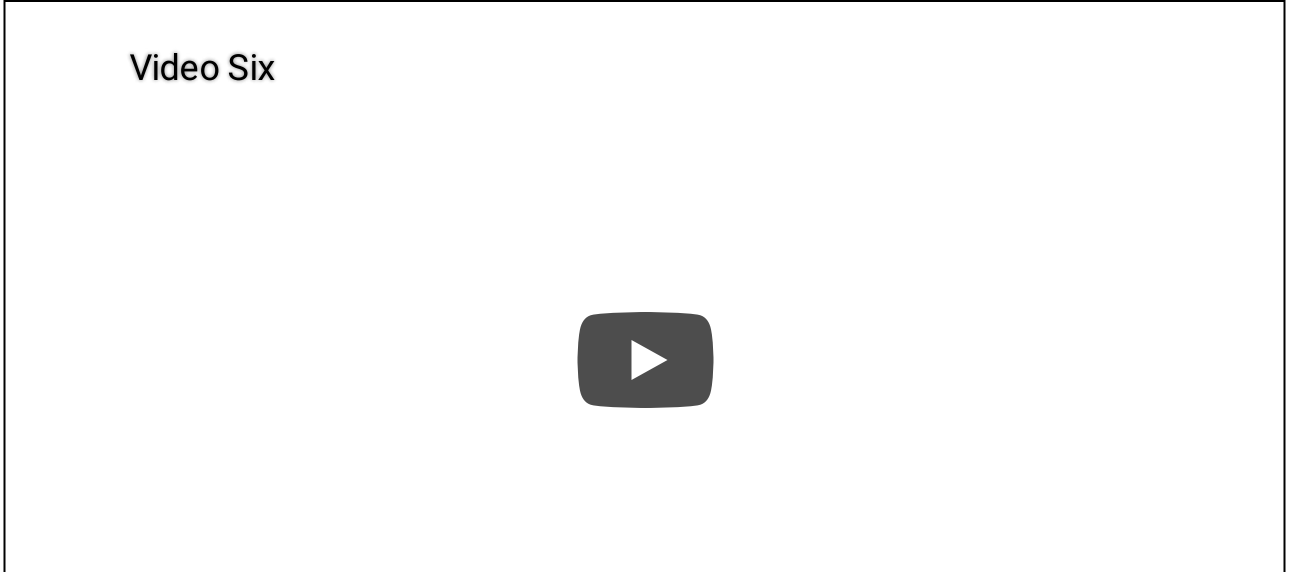
What We Believe

Investment Philosophy



Baron Clients

Team Approach



Next Steps

Name

Email Address

Message

8 + 15 =

Submit

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