Let me help you build the financial future you want.

Independent. Fee-Only. Fiduciary.

SCHEDULE AN INTRO CALL

FREE DIY FINANCIAL PLANNING COURSE

What We Do

At Wealth Habits our primary goal is to understand our client's needs and goals AND to deliver a highly customized and comprehensive solution for our client's planning and investment management needs.

Integrated Financial Planning

We work with smart clients who understand that the process of financial planning, when done right, is just as important as the plan itself.

Learn More

Investment Management

Our mission is to help you design, implement, manage, and monitor your portfolio based on your goals, timing, and risk tolerance.

Learn More

Blog & Insights

We publish articles with the intention to educate you on your path to financial freedom. I’m here to share with you the proven strategies, tools, and tactics that you need to achieve your goals more quickly and more efficiently.

Read the Blog

Limited Scope Projects

Financial Planning Projects are intentionally limited – and therefore focused. They're designed to help you address those most pressing issues in a concise, actionable manner.

Lets Connect

My Story

I have over 10 years of experience in the financial industry. I bring to the table extensive knowledge in tax, financial planning, and investment management.

This becomes necessary and valuable when dealing with complex financial planning questions that require a deep understanding of many variables, calculations, and tax laws. This is not typical expertise of a financial advisor.

Only someone who is a trained, experienced, and credentialed CPA and CFP® can help you effectively answer such questions…or you need two different experts working together.

About Me

About Wealth Habits

Wealth Habits is an independent fee-only (fiduciary) financial advisory firm in New York City. In a nutshell, we help our clients plan for the financial impact of major life events, so that they are prepared for life's biggest moments. Our financial services include investment management and integrated financial planning. While our specialty is all things for a starting couple — we help families get organized financially.

Our Mission

Wealth Habits is on a mission to transform and democratize the way financial advice is delivered to business owners and educated professionals, building a collaborative relationships and bridging the knowledge gap by leveling the playing field. Because everyone deserves an equal chance to succeed after several years of training.

CFP®. Fee-Only. Fiduciary. What does it mean? Why does it matter?

“ Look for a financial adviser who is a ***certified financial planner*** *(CFP). They’re licensed and regulated, plus take mandatory classes on different aspects of financial planning.*

Consider the planner’s ***pay structure****. You typically want to avoid commission-based advisers. Planners who work on commission may have less than altruistic incentives to push a certain life insurance package or mutual fund if they’re getting a cut of that revenue.”*

Look for a ***fiduciary****. In short, this means the planner has pledged to act in a client’s best interests at all times….This point is critical, and should be a deal breaker if a prospective planner is not a fiduciary.”*

WSJ Guide to Managing Your Money

Think we might be a good fit?
Let's get the conversation started...

Schedule A Call

Drop us a line

Don't be shy. Let us know if you have any feedback, questions, suggestions or comments!

Contact Us

Sign Up For The Newsletter

When it comes to achieving your financial goals, how do you know if you are fully informed to take the right decision?

Sign Up!