Welcome to Landmark Wealth Management, LLC

Comprehensive Financial Planning and Investment Management

About Us

Landmark Wealth Management LLC is an independent "Fee Only" U.S. Securities and Exchange Commission (SEC) Registered Investment Advisor, based on Long Island in Melville, New York, with conference centers located in Hauppauge and Uniondale. The firm's principals are JOSEPH M. FAVORITO, CFP® (https://landmarkwealthmgmt.com/joseph-favorito/), CHRISTOPHER N. CONGEMA, CFP® (https://landmarkwealthmgmt.com/chris-congema/) and BRIAN R. COHEN (https://landmarkwealthmgmt.com/brian-cohen/). The mission of the firm is to provide comprehensive financial planning and investment management services to individuals, families, small business owners, and charitable foundations.

READ MORE (HTTPS://LANDMARKWEALTHMGMT.COM/OUR-COMPANY)

Fiduciary

Unlike traditional broker/dealer relationships, Registered Investment Advisor's are required to act in in a Fiduciary capacity. The Fiduciary capacity is a higher standard of care, that at its core requires the Advisor to put the client's interests ahead of their own interests at all times.

Fee-Only

The only way that we are compensated, is through your fully disclosed management fee. In commission-based models offered by traditional brokers and similar financial intermediaries, those firms/employees are paid directly by the companies whose products they help to buy and sell. As you can imagine, that lends itself to conflicts of interests.

Cost-Effective

Unlike many who offer non-fiduciary advice, we actively seek the lowest-cost investment solutions among those available, to best help you meet your goals. Keeping the internal costs of investments as low as possible while attempting to lower correlations across investment solutions and maintaining liquidity.

Featured Videos

Our Typical Client - Landmark Wealth Management, financial advisors based on Long Isl...

SEC Registered Investment Advisor firm Landmark Wealth Management Principal Chris Congema, CFP® (CERTIFIED FINANCIAL PLANNER™) and financial advisor, describes what a "typical" client of their firm might look like.

Riskalyze enables advisors to pinpoint an investor's Risk Number and build a portfolio that contains just the right amount of risk. Leading scientific theory is used to objectively pinpoint an investor’s Risk Number

Just The Facts About NAPFA

The National Association of Personal Financial Advisors (NAPFA) launched a national ad campaign to promote the difference between those financial advisors who are Fee-Only in their compensation and work in accordance with a strict fiduciary standard.

Articles

- **Required Minimum Distributions: Minimizing the Tax Impact (https://landmarkwealthmgmt.com/required-minimum-distributions-minimizing-the-tax-impact/)**
- **Exchange Traded Funds: Not Always a Passive Approach (https://landmarkwealthmgmt.com/exchange-traded-funds-not-always-a-passive-approach/)**
- **A Strong Case: Equal Weighting vs The Dividend Aristocrats (https://landmarkwealthmgmt.com/making-the-case-equal-weighting-the-dividend-aristocrats/)**

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Guest Articles

- **Q3 2019 Global Market Outlook by Russell Investments (https://landmarkwealthmgmt.com/q3-2019-global-market-outlook-by-russell-investments/)**
- **Q2 2019 Global Market Outlook by Russell Investments (https://landmarkwealthmgmt.com/q2-2019-global-market-outlook-by-russell-investments/)**

- 2019 Investment Outlook from American Century (https://landmarkwealthmgmt.com/2019-investment-outlook-from-american-century/)

See All Guest Articles (/guest-articles/) ››

Newsletters

- Q3 '19 Investment Newsletter (https://conta.cc/2J9H9Ao)
- Q2 '19 Investment Newsletter (https://conta.cc/2K2Bj6g)
- Q1 '19 Investment Newsletter (https://conta.cc/2F9UQxO)

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Schedule A Meeting

Name*

Email*

Phone*

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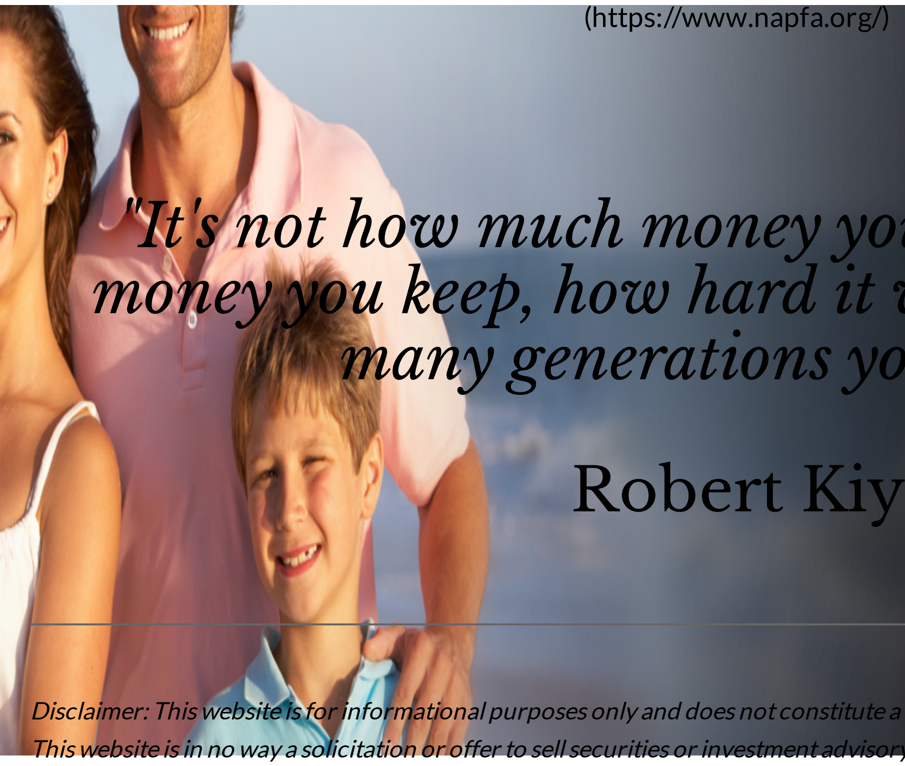
(https://landmarkwealthmgmt.com)

(http://www.cfp.net/)

(http://www.napfa.org/)

(https://www.napfa.org/)

(https://www.onefpa.org/Pages/default.aspx)



"It's not how much money you make, but how much money you keep, how hard it works for you, and how many generations you keep it for."

Robert Kiyosaki

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