



Our Mission

To develop a measurable retirement plan for our clients that covers investment management, income and asset protection as well as efficient use of taxation strategies.

Simply put, we manage wealth and wealth accumulation. Our portfolio management services begin with stressing the importance of you making fiscally responsible decisions and disciplined economic choices in your personal life so we can effectively help you achieve your monetary goals for today's needs, tomorrow's dreams, and a future legacy.

Regardless of the stage in life you are in (starting out, growing your family/career or retirement) our focus will always be to prioritize your goals. Creating plans across time will help ensure you're making use of the best strategies and have an expert along side you during your everchanging circumstances.

Contact Us



Jon S. Xynidis

Address:

101 2nd Street, Suite 402
Holly Hill, Florida 32117

[<https://www.google.com/maps/place/Xcel+Wealth+Management/@29.2302737,-81.0298342,18z/data=!3m1!4b1!4m5!3m4!1s0x88e6d98828ef05ef:0xe0c5d039d81.028914?hl=en-US>]

Tel:

386-872-3440 [tel:3868723440]

Fax:

386-872-3442 [tel:3868723442]

Email:

jxynidis@xcelwealth.com [mailto:jxynidis@xcelwealth.com]



Erick J. Palacios

Address:

101 2nd Street, Suite 402
Holly Hill, Florida 32117

[<https://www.google.com/maps/place/Xcel+Wealth+Management/@29.2302737,-81.0298342,18z/data=!3m1!4b1!4m5!3m4!1s0x88e6d98828ef05ef:0xe0c5d039d81.028914?hl=en-US>]

Tel:

386-872-3440 [tel:3868723440]

Cell:

386-341-8985 [tel:3863418985]

Fax:

386-872-3442 [tel:3868723442]

Email:

erick@xcelwealth.com [mailto:erick@xcelwealth.com]



Randall A. Beardsley

Address:

101 2nd Street, Suite 402
Holly Hill, Florida 32117

[<https://www.google.com/maps/place/Xcel+Wealth+Management/@29.2302737,-81.0298342,18z/data=!3m1!4b1!4m5!3m4!1s0x88e6d98828ef05ef:0xe0c5d03981.028914?hl=en-US>]

Tel:

386-872-3440 [tel:3868723440]

Fax:

386-872-3442 [tel:3868723442]

Email:

randy@xcelwealth.com [mailto:randy@xcelwealth.com]



Suzanne K. Inklebarger

Address:

101 2nd Street, Suite 402
Holly Hill, Florida 32117

[<https://www.google.com/maps/place/Xcel+Wealth+Management/@29.2302737,-81.0298342,18z/data=!3m1!4b1!4m5!3m4!1s0x88e6d98828ef05ef:0xe0c5d03981.028914?hl=en-US>]

Tel:

386-872-3440 [tel:3868723440]

Fax:

386-872-3442 [tel:3868723442]

Email:

suzanne@xcelwealth.com [mailto:suzanne@xcelwealth.com]

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