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Advisory Business

Massachusetts Wealth Management (MWM) manages client assets to the individual need of clients.

We actively manage asset allocation within a mix of cash equivalents, investment grade bonds including corporate, municipal and treasury issues, as well as S&P ranked companies.

We concern ourselves with economic and business cycles as they impact asset prices.

We attempt to earn stock market rates of return with less than market risks.

All of our assets are managed on a fully discretionary basis within the confines of an Investment Policy Statement, which we produce for each client.

Our Expertise Includes:

- Portfolio Management
- Client Service
- Understanding your financial needs
- Developing a long term relationship

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