DIVERSIFIED
PRIVATE WEALTH
ADVISORS

Welcome,

I'm Dominick Tavella, Founder and President of Diversified Private Wealth Advisors in Hauppauge, NY. We understand that individuals face unique challenges as they prepare for retirement. We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to try to build wealth, protect your family, or help preserve your assets, our personalized service focuses on your needs, wants, and long-term goals.

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you through all stages of your life.

CONTACT US (/CONTACT-US-1)

Our Mission

Diversified Private Wealth Advisors is dedicated to the success of its clients. In today's complex investment environment, our firm offers professionalism, integrity and extensive investment knowledge.

Whether for individuals, executives, business owners or high net worth individuals, we strive to deliver customized planning strategies and a full-range of investment services to each of our clients. As a Diversified Private Wealth Advisor client, you will receive the personal attention you deserve with a unique approach to asset allocation and investment management strategies.

Our Philosophy

For most families, investing in the financial markets is a mystery. Confused by an over-abundance of information and an extremely limited amount of time to devote to it, people find themselves searching for that special someone to help them make sense of it all. The journey to be more financially aware often leads to poor asset allocation and unorganized preparation. With no established goals or means to evaluate, the neglected investment portfolios then guide themselves if the investments fail to address investment goals. Often an investor concludes they took too much risk, invested at the wrong time, were poorly advised, and in some cases feel as though they were unlucky. Here at our office, we help our clients develop investment strategies for over a realistic period of time, and maintaining investors inside their risk based on their suitability.

This philosophy of investing is based on three principles: Defined Goals, Discipline and Evaluation. What it does is combine the needs of the investor with the long term perspective of the financial markets to hopefully address the desired results within their risk tolerance. This is an ongoing, ever-changing process, much like life; that is why it needs strict evaluation and regular input from both parties. With a consistent line of communication between the financial associate and client, we can stay on top of both the changing needs of the investor and the changing trends in the economy, so "Together Addressing Goals" now becomes possible.

Our Services

Retirement Planning Strategies

- IRA / Roth IRA
- Pensions / Profit Sharing
- SIMPLE Plans
- SEP-IRA Plans
- 401(K) / 403(B) Plans

Insurance Services

- Life
- Annuities
- Health
- Long Term Health Care
- Disability

Investment Services

- Stocks
- Corporate Bonds
- Municipal Bonds
- Zero Coupon Bonds
- Mutual Funds
- Real Estate Investment Trust
- Variable Insurance Annuities

College Savings Analysis

- Custodial Accounts
- Educational IRA
- College Saving Plans

Estate Analysis

- Estate Tax Analysis
- Creation
- Estate Conservation Strategies
- Distribution Analysis

Business & Corporate Analysis

- Corporate Benefit Plans
- Business Continuation Planning
- Deferred Compensation
- Key Person Insurance
- Buy Sell Agreement Ideas

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