A FEE-ONLY, INDEPENDENT FINANCIAL ADVISOR

Let Us Be Your Trusted Advisor So You Can Focus On Life's Other Priorities

Get In Touch

Our goal is to be your one-stop source for all matters that concern your financial life. We know you would rather be spending time with family and friends than worrying about your finances.

Fiduciary

Who you work with matters. We work with you in a fiduciary capacity at all times and with every type of account. That isn't the case with most other advisors.

Fee-Only

How your advisor gets paid matters. We only get paid by you. We do not accept commissions or fees from any third parties.

Long-Term Focus

How you invest matters. We don't believe that markets can be timed. We focus on low-cost, tax-efficient, well diversified investments.

EXPERIENCED ADVISORS

Providing Personalized Experiences

Who We Are

Woodside Wealth Management is made up of dedicated, experienced and credentialed financial advisors who provide top-notch client services and expert advice to individuals, families, and businesses. We have decades of experience in the Financial Planning and Wealth Management industry, and our lead advisors are all CERTIFIED FINANCIAL PLANNER ™ professionals.

Our Team

Cheryl A. Costa, MBA, CFP®

FOUNDING PRINCIPAL

Matthew Costa, CFP®

FINANCIAL ADVISOR

Kevin Henderson

ASSOCIATE ADVISOR

Miriam Miller

CLIENT SERVICES ADMINISTRATOR

SEE WHAT WE CAN DO FOR YOU

Wealth Management You Can Trust

What We Do

Woodside is different from most wealth management firms. When we work with clients, we devote a lot of time and energy to getting to know them personally and to identifying their specific financial goals. We do this because we feel that this information is crucial to designing portfolios that will “work” for them– portfolios that they will have confidence in and will stay with when times are good and when times are not so good. Here is how that process works:

Plan

First, we will gather data in order to identify where you are now and where you want to be in the future. We then analyze your financial situation and develop a baseline plan and asset allocation plan using goals and assumptions we mutually agree upon and then determine what steps need to be taken.

Implement

Next, we will make specific recommendations to help put your plan in motion. We will open accounts, and ensure you have a properly diversified portfolio. We will likely meet several times over the first year of our relationship to ensure everything goes according to plan.

Monitor

Once your plan has been implemented we continually monitor your progress towards achieving your goals and we meet with you regularly to ensure that you are meeting all of your financial commitments. Our goal is to partner with you for decades, not just years.

A LITTLE MORE ABOUT US

Frequently Asked Questions

How Is Woodside Different?

How Do You Work With Clients?

What Is Your Investment Philosophy?

How Often Will We Meet?

Woodside is a fee-only Registered Investment Advisory firm and, as such, we are compensated only by our clients. We do not accept commissions and we do not pay or receive referral fees of any kind. In fact, there are no third party payments at all that would color our investment or planning advice.

In addition, it is important to note that when we work with clients, **we are acting in a fiduciary capacity** and are held to a fiduciary standard. This means that we have a duty to put our client's interests first. Many people think all advisors are held to a fiduciary standard but the majority of "financial advisors" are held only to a suitability standard, which means that their only obligation is only to suggest investments that are suitable, which is a much lower standard.

It is also important to note that when we work with clients, we are **always** working in a fiduciary capacity. Other firms may reference a fiduciary standard in their literature or on their website but may only be a fiduciary in certain instances or when working with certain types of accounts. Ask any advisor you are thinking of retaining if they act as a fiduciary at all times and with all types of accounts.

READY TO GET STARTED?

Get In Touch

Contact Us

Our website contains a lot of great information, but it is no substitute for a face to face meeting. If it seems like our firm is a good match for you, we encourage you to call our office and schedule a complimentary “get acquainted” meeting. This meeting typically lasts 45 minutes to an hour. During this meeting, we want to hear more about you and what you are looking for in a trusted advisor. We will also tell you more about our firm and the services that we provide.

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MESSAGE

Send

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