



WE FOCUS ON WHAT MATTERS MOST TO YOU

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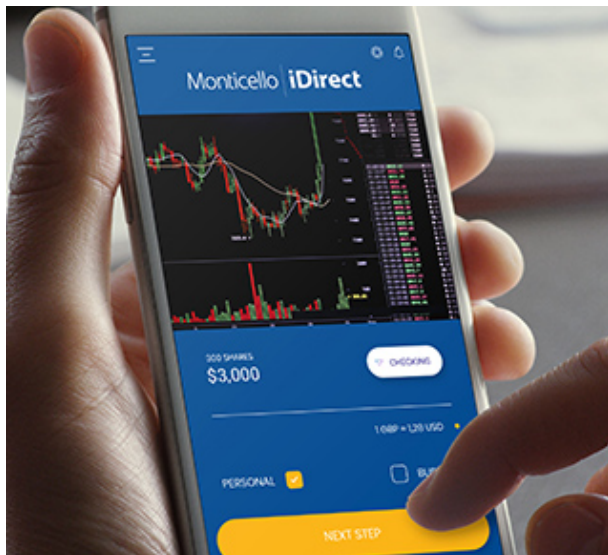
INVESTMENT MANAGEMENT



PRIVATE BANKING



TRUST



iDIRECT™

REALIZING YOUR VISION FOR YOUR WEALTH. WE TAKE IT PERSONALLY.

Wealth management is highly complex, but it's also highly personal. Every family has a unique set of circumstances, priorities, and goals.

At Monticello Wealth Management, we start by listening. We don't subscribe to one-size-fits-all financial strategies. Our approach is comprehensive, nuanced, and tailored to fit your personal circumstances.

What distinguishes us from other wealth management firms? There are many factors, but what it comes down to is that we are part of the strong Jefferson Bank Legacy.

Our focus is realizing your vision for your wealth.

[GET STARTED](#)

WHAT'S PERSONAL TO YOU IS PERSONAL TO US.

[MEET THE TEAM](#)



LOGIN

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