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**TRUST.**  
AT BOGART WEALTH  
THERE IS NO QUESTION.

When it's time to plan for retirement, transfer your wealth to the next generation, or investigate your best options, you should ask tough questions.

**WE BELIEVE THE ANSWER IS BOGART WEALTH**

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## WHY RIA?

Our independence means your interests are placed above all else.

Unlike broker dealers, who are held to the lesser “suitability standard,” we are required to act according to our fiduciary duty. As a fiduciary, we are held to the highest standards of conduct and have a duty to not only act in the best interests of our clients, but also to provide full and fair disclosure of all material facts to our clients and a duty to avoid misleading them. We like that. Our fees are transparent, so you can be confident that we are accountable to you in everything we do. We wish every institution could make these statements, but they cannot. We have selected Charles Schwab & Co., Inc. to be our custodian, bringing all the resources and expertise of one of the world’s leading RIA custodians to all of our clients.



[Visit the Independent Advisor Learning Center to learn more about the benefits of working with an independent financial advisor. \(http://www.findyourindependentadvisor.com/\)](http://www.findyourindependentadvisor.com/)

BLOG POST

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[The Fiduciary Rule \(https://bogartwealth.com/?p=713\)](https://bogartwealth.com/?p=713)

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# WHY BOGART?

## Are your dreams unique?

Our family, now in its fourth decade of advising successful executives, entrepreneurs and families, understands that every situation is different. Our approach is to fully understand your dreams — not just your “risk profile” — and then to present you with the options that best serve you, unfettered by the restrictions and agendas of a big institution.

# IS A BOUTIQUE RIGHT FOR ME?

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## LATEST BLOG POSTS

[Interest Rate Outlook – Q2 2019 \(https://bogartwealth.com/interest-rate-outlook-q2-2019/\)](https://bogartwealth.com/interest-rate-outlook-q2-2019/)

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[Retire with Confidence – Have a Plan \(https://bogartwealth.com/retire-with-confidence/\)](https://bogartwealth.com/retire-with-confidence/)

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[Your Child & Self-Worth \(https://bogartwealth.com/your-child-self-worth/\)](https://bogartwealth.com/your-child-self-worth/)

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[Opportunities in Volatile Markets \(https://bogartwealth.com/opportunities-in-volatile-markets/\)](https://bogartwealth.com/opportunities-in-volatile-markets/)

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[Tax Season is Here Again \(https://bogartwealth.com/tax-season-2019/\)](https://bogartwealth.com/tax-season-2019/)

## RECENT VIDEOS

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## LATEST EVENTS

[Net Unrealized Appreciation & Post Retirement Strategies \(https://bogartwealth.com/events/net-unrealized-appreciation-post-retirement-strategies-6/\)](https://bogartwealth.com/events/net-unrealized-appreciation-post-retirement-strategies-6/)

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[Net Unrealized Appreciation & Post Retirement Strategies \(https://bogartwealth.com/events/net-unrealized-appreciation-post-retirement-strategies-9/\)](https://bogartwealth.com/events/net-unrealized-appreciation-post-retirement-strategies-9/)

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[Social Security Planning Strategies \(https://bogartwealth.com/events/social-security-planning-strategies-3/\)](https://bogartwealth.com/events/social-security-planning-strategies-3/)

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[Social Security Planning Strategies \(https://bogartwealth.com/events/social-security-planning-strategies-4/\)](https://bogartwealth.com/events/social-security-planning-strategies-4/)

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[Retirement Planning Timeline \(https://bogartwealth.com/events/lunch-seminar-retirement-planning-timeline-10/\)](https://bogartwealth.com/events/lunch-seminar-retirement-planning-timeline-10/)

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