Bartlett WEALTH MANAGEMENT

Turning *transitions* into new beginnings.

We help you transform life's transitions into possibilities. Our team of wealth management experts will partner with you to chart the best path forward.

LET'S TALK ABOUT YOUR FUTURE

Our Partner Process

We follow a three-step process to address your specific goals and wealth management needs:

Explore

Before hashing out plans for your financial goals, we want to get to know you first. Meet with your Bartlett team, discuss your financial situation, and share your dreams, fears, and hopes for the future, so we understand all the ways Bartlett can serve you.

Build

Once we've chosen to work together, our team gathers data and builds a plan to meet the goals you identified. Your Bartlett team supports you during an ever-changing process, helping you through difficult decisions that need to be addressed along the way.

Execute

It's time to put your plan into action - but we don't stop there. Our team regularly assesses your results and goals throughout our relationship, ensuring that our wealth management solutions continue to meet your changing needs.

Be Ready for Whatever Comes Your Way

Whether it's a newly empty nest, marriage, divorce, moving, a big promotion at work, aging parents, selling a business, or starting a new one…change is inevitable. At Bartlett, we're here to help you transform life's big transitions into possibilities. Our team of wealth management experts will partner with you to chart the best path forward to your financial future.

GET THE GUIDEBOOK

Your team, focused on your goals.

At Bartlett, you're not just any client. We believe you're someone special. And you'll feel it throughout your relationship with us. We start by bringing you your personal team of accomplished financial experts – investment advisors and a client relationship associate plus a behind-the-scenes group of research analysts and support staff. All are chosen for their skill and expertise as well as for their unwavering commitment to you, their client.

They are your team. And they focus on your goals.

MEET YOUR TEAM

WATCH OUR VIDEO

Recent Insights

JULY 01, 2019 // BARTLETT UPDATES

Bartlett Family Expands to Include Chicago-based Lodestar Investment Counsel

MARCH 26, 2019 // FINANCIAL PLANNING

Adulting Doesn't Have to Be Hard: Savings & Spending Tips for Millennials

FEBRUARY 28, 2019 // FINANCIAL PLANNING

How Much Value Does Your Financial Advisor Add? (Hint: It's probably more than you think.)

With roots dating back more than 120 years, Bartlett Wealth Management enjoys a reputation as a premier financial organization that's home to the industry's finest talent. Our story is one of opportunities taken to better serve our clients. Today, we…

A 2018 report from Bank of America revealed that one in six millennials – those born between 1981 and 1996 – is sitting on $100K or more in savings. Impressive, right? That is until you consider other surveys by LendEDU…

Like most big tasks in life, when it comes to creating a financial plan, it's always best to enlist the help of a professional. And as research and conventional wisdom shows, working with a financial advisor can result in a…

Our goal is reaching yours.

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