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blog?Manager

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Let's talk about your financial future. Start right here »

Book an Appointment (/lwm/book-an-appointment)

? Ask a Question (/lwm/ask-a-question-get-an-answer)

This is How We Help Clients

LWM Planning - Who We Are

01:05

Welcome to LeConte Wealth Management.

We are an independent financial firm that has been helping the good people of East Tennessee establish and maintain their long-term financial goals since 2007.

If you're a current client, you'll find links to access your account, make appointments with us, get up-to-date information about the stock markets, and view useful resources that can help empower you to be a more knowledgeable investor (the kind we like!).

If you're not currently acquainted with our firm, we've established this Web site as a way for you to get to know us and understand how we can help you get to that point where you don't have to worry about whether your money is doing right by you.

Join us on our blog, Financial Friction (/financial-friction)for our take on investment and economic topics written from our independent, plain spoken perspective.

The Role of Your Financial Advisor

Principled Counsel | Defining Wealth Management | Our Local Advantage

The Evolution of Advice

During the past twenty years, things have changed in the world of financial services. Investors have shifted away from relying on stock brokers to make their investment decisions. Though equity and insurance brokers certainly provided access to a variety of great products, they were salesmen looking for commissions on trades and offering advice only secondarily. The client who needed advice regarding taxation, for instance, had to consult a CPA. And, when somebody needed help planning for retirement, many stockbrokers struggled to assist.

As investment products have become increasingly complex and investor needs have expanded, clients have turned from brokers to financial professionals. Individuals who used to pay for products and get guidance for free now pay for guidance while still getting best-of-class products. Because we believe that the trend toward guidance conforms to our client-first philosophy, we offer ourselves to you as wealth consultants.

Choosing the Right Advisor

Deciding on an Advisor

02:09

Robo or Real?

Robo Advisor or Real Advisor

02:29

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