Meet the Team

Services

Blog

Who We Are

Founded in 1981, LongView Wealth Management is a fee-based personal wealth management firm bringing over 35 years of extensive knowledge and experience to the practice of financial planning and wealth management. We operate as a registered investment advisory firm and, therefore, serve as **fiduciaries** – acting in the best interest of our clients. We provide independent, objective, and unbiased financial advice to help our clients simplify their lives and accomplish their goals. We are based in Atlanta, Georgia, but we maintain offices in a number of different locations across Georgia and Colorado.

Meet the Team

What We Do

We believe that personal wealth management can transform lives, families and generations. As a fee-based personal wealth management firm we have seen over and over again, that real wealth is built when clients resist the pressures of short-term thinking and reactive decision making. We work with our clients to learn about the visions and goals they have for their lives. We then translate those visions and values into comprehensive financial plan that integrates all areas of their financial lives.

Our Services

Blog

I sold my business and I *STILL* can't retire??!

Written by: Kirk Licata, CFP® Having been raised in a family whose livelihood depended upon a small business, I know from personal experience the extent to which the successes or failures of such a business can become integrated into an individual or family's...

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Why We LOVE LOVE HSAs

By: Michael Lipsey, CFP®, AIF® Imagine that you can deposit money into an account that: Gives you a tax deduction May reduce your FICA (Social Security) taxes Grows tax free and may generate tax free distributions Might be set up with money from your employer

Can...

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2019 First Quarter Investment Market Report: Will the Party Continue?

The long, painful market decline in the last month of 2018 seemed to promise more of the same for the new year of 2019, but at the end of the first quarter, the results couldn't have been more different. The U.S. market, measured by a variety of indices, posted its...

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