NEW ENGLAND GUILD WEALTH ADVISORS

Trust Matters

Our Mission

Contact Us

The mission of New England Guild Wealth Advisors, "The Guild", is to improve our clients' financial well-being. In this endeavor, we provide our clients with objective investment advice and wealth management solutions designed to achieve their financial goals and address life's ever-changing challenges.

We are distinguished by our collaborative approach. Our group brings diverse financial capabilities, backgrounds and an average of 20 years of experience to clients of the firm. We provide our clients with solutions, that incorporate elements and capabilities not usually offered by other investment management firms.

Acting in our role as Fiduciary, we maintain a client focus in everything we do. Our firm is committed to being unbiased and independent, while consistently offering highly personalized service and creative solutions. We don't work for commissions. We don't have sales incentives, third-party compensation or "in-house" promoted investment products. We are fee-only, and as such, the only fee we earn is the fee we earn from you. That enables us to provide the kind of value, creativity and objective counsel that truly places our **clients' best interests first.**

LOCATION

139 Simsbury Road
Avon, CT 06001

CONTACT US

info@neguild.con
860.404.5900

“We put a high priority on knowing our clients and the people and things they care about. This is as important to us as understanding their financial goals and challenges."

— SUSAN M. GRAYSON, PRINCIPAL

Areas of Practice

INVESTMENT MANAGEMENT

We believe that every asset exists to satisfy a future need for cash; thus, risk is really defined as not having the cash when you need it. Through a holistic investment approach that incorporates goal-driven financial planning, we can help you

RETIREMENT PLANNING

We can help you establish a plan as you transition from employment and wages to "harvesting" your portfolio to supplement social security and/or pensions to provide for your income needs in retirement. We canalso help

INTEGRATED FINANCIAL, TAX, AND INVESTMENT STRATEGIES

As the saying goes "it's not what you make, but what you get to keep". We can help you ensure that assets are aligned and managed to construct a customized portfolio that places equal emphasis on your cash flow needs as well as your return goals and risk tolerance.

you create appropriate social security strategies for you and your spouse.

achieve the intended outcome with respect to the impact of income, gift and estate taxes.

ESTATE & CHARITABLE PLANNING

We often work with clients to create a strategy for the transfer of their wealth. Plans may include educating children and/or grandchildren; providing for intergenerational wealth transfers; developing a succession plan for your business; building a framework for the design and creation of wills and trusts. We can help you set up Charitable Endowments and/or develop prudent gifting strategies that achieve your philanthropic goals while being sensitive to tax issues.

DIVORCE PLANNING

Divorce can present unique challenges for clients. We can help you with the consolidation and assessment of your assets, the determination of future financial needs and the development of investment objectives specific to your new life goals.

INSURANCE PLANNING

We can help you with the review of insurance needs to protect existing assets and income streams. The review includes life, disability and long-term care insurance needs. If insurance is needed, we would work with both you and your agents to select the product most suitable to address your needs.

860.404.5900| info@neguild.com
139 Simsbury Road Avon, CT 06001
A Registered Investment Advisor

New England Guild Wealth Advisors provides highly individualized wealth and financial management services to high net worth individuals and their families. We offer strong investment management expertise combined with financial services customized to achieve our clients' financial, investment and life goals.