







## It Starts with a Plan

We offer 24/7 online account access and interactive financial planning software. We give you the tools to be as involved as you want to be with your financial future.

[Let's Get Started](#) »

# Welcome to Wingate

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Wingate Wealth Advisors is an independent, fee only, wealth management and financial planning organization dedicated to serving the personal financial needs of individuals and families.

Since 1986, we have been providing financial guidance that is objective, individualized and timely...

[Read More](#) »

## Who Are We?

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*Professionals dedicated to serving the personal financial needs of individuals and families.*

8

*Certified Financial Planners (CFP®'s)*

31

*Years in Business*

20

*Years average experience of partners*

In an ever-changing world, our  
commitment to clients is *Constant*

## A Process that Works

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# Define Goals



You need to know your goals in order to reach them. We can help you define your real-life needs.

# Identify Action

With your goals more clearly defined, we discuss possible courses of action.

# Develop a Plan

Using state-of-the-art software, we'll guide you through an interactive planning process.

# Review & Revise

Financial planning is a dynamic process, not a onetime event. We will continue to meet with you over time as your life changes.

Why wait any longer? Contact us today!

## Our Blog

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Find out the latest news to help you reach your financial goals.

[Leaving Your Employer? How to Avoid Also Leaving Half of Your Deferred Compensation to the IRS.](#)



[Should I Stay or Should I Go? What to Consider if You Wish to Age in Your Home](#)

[Establishing a Budget](#)

[The Fundamentals of Disability Insurance](#)

## Start Planning Your Future Today

[Contact Us](#) »



📍 450 Bedford Street  
📍 Lexington, MA 02420

☎ 781-862-7100

📅 781-861-9707

✉ [Info@WingateWealthAdvisors.com](mailto:Info@WingateWealthAdvisors.com)

## Five Things to Do Before a Child Goes Off to College

Enter Your Email So We Can Send You a Complimentary Copy

\*Email Address

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