Welcome
to a better wealth management experience

FINANCIAL PLANNING

With CERTIFIED FINANCIAL PLANNER™ professionalism and expertise

MORE (https://harbor-wealthmanagement.com/financial-planning/)

LIFE EVENTS PLANNING

Whether it is Retirement, College, Career, and more

MORE (https://harbor-wealthmanagement.com/life-events/)

INVESTMENT MANAGEMENT

Proven strategies through analysis, allocation and portfolio design

MORE (https://harbor-wealthmanagement.com/investment-management/)

DIVORCE PLANNING

With a Certified Divorce Financial Analyst (CDFA), with answers and financial consultation for your most urgent questions

MORE (https://harbor-wealthmanagement.com/divorce-planning/)

TAKE CONTROL OF YOUR FINANCIAL FUTURE

STARTING RIGHT NOW (/who-we-work-with/)

Over 30 years ago, we built Harbor Wealth Management with one goal in mind: To provide the best, CERTIFIED FINANCIAL PLANNER™ service in Colorado. Period.

We specialize in providing comprehensive financial planning and investment management to individuals, families, and small businesses since 1988 from our locations in Boulder and Denver.

CALL 303-939-8788 FOR A COMPLIMENTARY INTRODUCTORY MEETING

WE ARE WOMEN OWNED AND WOMEN OPERATED

This is rare in the financial planning industry, yet survey after survey confirms what we already know. Women-owned firms are known for building strong, trusted relationships with their clients.

MEET OUR TEAM (team-page/)

We were among the first with a fee for services business model that takes the bias out of advice to our clients. We do what's best for you, not the other way around.

Fee Only

Sadly, many financial planners have nothing to offer young adults. We do. We see you as the future, and so we want to help you get there financially sound. We want to help you create a solid foundation, avoid pitfalls to help you efficiently grow your wealth to achieve your dreams.

Customized services for Millennials and young professionals.

That means when the industry standard ratio of clients-to-advisor runs in the 100's to 1, we maintain a ratio of no more than 80 to 1. At Harbor Wealth Management, you'll receive service that is high touch to be more in touch with your specific financial needs.

High Touch Service

When we started Harbor Wealth Management, choices were limited, advice was scarce, and the main product was in the form of commissionable trades for stocks. We took a different path that keeps our advice unbiased and our clients first.

Over 30 Years of Business Success

We put our clients in investment portfolios that are highly regarded by research firms for their strong, consistent returns.

Risk-adjusted Investment Portfolios

This facilitates long range planning for families and their multigenerational financial needs. We also work closely with our clients' other professional advisors to ensure a cohesive plan.

We take special pride in forming lifetime relationships with our clients.

WHAT SHOULD YOU EXPECT FROM US?

Professional approach. Caring attitude. Innovative thinking. Sound advice. Lifelong dedication. We deliver that and more to our clients, everyday. If you are considering a financial planner to guide you to your wealth management goals, we make this solemn promise to you:

We will guide you with an experienced, professional team.

We will give you the highest level of service and attention.

We will always ask the right questions and we will always listen intently.

We will design a unique plan that meets your needs and goals.

We will be there for you. Always.

COMPLIMENTARY INTRODUCTORY MEETING

Name

Email

Phone

How do you prefer to be contacted? Phone Call Email Text

I'm not a robot

reCAPTCHA
Privacy - Terms

SEND REQUEST >

NEWS & UPDATES

(https://harbor-wealthmanagement.com/news-views/harbor-staff/welcome-wealth-management-interns/)

Welcome Wealth Management Interns! (https://harbor-wealthmanagement.com/news-views/harbor-staff/welcome-wealth-management-interns/)

June 17, 2019

(https://harbor-wealthmanagement.com/news-views/events/cybersecurity-event-at-harbor/)

Cybersecurity Event at Harbor (https://harbor-wealthmanagement.com/news-views/events/cybersecurity-event-at-harbor/)

June 3, 2019

(https://harbor-wealthmanagement.com/news-views/press/retirees-need-emergency-funds-too/)

Retirees Need Emergency Funds Too (https://harbor-wealthmanagement.com/news-views/press/retirees-need-emergency-funds-too/)

May 15, 2019

(https://harbor-

wealthmanagement.com/news-views/staff-picks/1403/)

June 26, 2019 | By Harbor Wealth Management

Furry Friends (https://harbor-wealthmanagement.com/news-views/staff-picks/1403/)

DID YOU KNOW?

The average 65-year-old couple will spend $280,000 on health care over the remainder of their lives.

Source (https://www.cnbc.com/2018/11/02/if-youre-planning-to-retire-in-2019-heres-how-to-

It only crack a to 10 ch months

CONNECT WITH US

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