



## WHAT ARE YOU PLANNING FOR?

THOUGHTFUL FINANCIAL  
PLANNING & EFFICIENT  
INVESTMENT MANAGEMENT SO  
THAT YOU CAN LIVE THE LIFE YOU  
WANT.

## ABOUT US

**WE ARE THERE FOR OUR CLIENTS WHEREVER LIFE AND WEALTH MEET.**

**OUR CLIENTS HAVE RELIED ON US FOR MORE THAN 30 YEARS TO PROVIDE INDEPENDENT ADVICE AND GUIDE SOUND FINANCIAL DECISIONS. TODAY, WE HAVE BEEN ENTRUSTED TO MANAGE MORE THAN \$600 MILLION OF ASSETS\* FOR MORE THAN 400 CLIENTS AND THEIR FAMILIES. AS A FEE-ONLY ADVISOR, WE ADHERE TO THE FIDUCIARY STANDARD, DISCLOSING CONFLICTS AND ACTING IN OUR CLIENT'S BEST INTERESTS.**

**PLEASE GET IN TOUCH TO FIND OUT WHAT SETS US APART.**

BOOK A FREE CONSULTATION

START PLANNING NOW!

## FAQS

**WHO WOULD MANAGE MY INVESTMENTS?**

+

**WHY DO I NEED A FINANCIAL PLAN?**

+

**WHY HIRE A CFA CHARTERHOLDER?**

+

**WHAT DOES FEE-ONLY MEAN?**

+

## HOW CAN WE HELP YOU?

Find out how we can help you reach your financial freedom

LEARN MORE

CONTACT US

# GET STARTED NOW

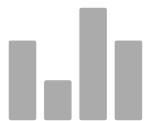
For more information on our services



Call us today  
[410-653-7979](tel:410-653-7979)



Email Us  
[info@wbhadvisory.com](mailto:info@wbhadvisory.com)



INVESTMENT  
MANAGEMENT



FINANCIAL  
PLANNING



RETIREMENT  
PLANNING

# BLOGS

## TRADITIONAL VS. ROTH IRAS



## SAVING FOR COLLEGE TODAY



## CHARITABLE GIVING IN 2019



1829 Reisterstown  
Road, Suite 225  
Baltimore, MD 21208-  
1306

410-653-7979

[info@wbhadvisory.com](mailto:info@wbhadvisory.com)

[About](#)

[Contact](#)

[ADV](#)

[Disclosure](#)

Please remember that different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment or investment strategy (including those undertaken or recommended by WBH), will be profitable or equal any historical performance level(s).

Certain portions of WBH's web site (i.e. newsletters, articles, commentaries, etc.) may contain a discussion of, and/or provide access to, WBH (and those of other investment and non-investment professionals) positions and/or recommendations as of a specific prior date. Due to various factors, including changing market conditions, such discussion may no longer be reflective of current position(s) and/or recommendation(s). Moreover, no client or prospective client should assume that any such discussion serves as the receipt of, or a substitute for, personalized advice from WBH, or from any other investment professional. WBH does not provide legal or tax advice, and the information provided is general in nature and should not be considered legal or tax advice. Consult an attorney, tax professional, or other advisor regarding your specific legal or tax situation.

\* As of December 31, 2018, WBH's assets under management totaled \$637,860,000.

© 2019 WBH Advisory All rights reserved.