



---

Our financial planners work with individuals, families and institutions to create customized wealth management and financial solutions that successfully address short- and long-term financial objectives

---

---

## Our Services

Forteris Wealth is a fee-only, independent financial planning and wealth management firm.

[LEARN MORE →](#)

## Education Planning

Analyzing and maximizing college funding opportunities and helping to set realistic, achievable savings goals.

[READ MORE →](#)

## Estate Planning

Reviewing your estate plan and working with your attorney to update and modify the plan as needed.

[READ MORE →](#)

## Insurance Planning

Protecting your assets against financial loss due to death, disability and personal liability.

[READ MORE →](#)

## Alternative Investment Strategies

Identifying alternative, low volatility investments to help your long-term investment and financial goals.

[READ MORE →](#)

## Tax Planning

Working to maximize after-tax gains, minimize losses, and structuring your portfolio with your individual tax situation in mind.

[READ MORE →](#)

## Investing

Developing a personalized portfolio that helps protect your assets and reach your financial goals.

[READ MORE →](#)

---

### RECENT BLOG POSTS

- > [How to Protect Yourself in the Wake of the Equifax Data Breach](#)
- > [Over 50 and Looking to Save More for Retirement?](#)
- > [Retiring in 40 years? Don't wait. Start Saving Now!](#)

### ABOUT FORTERIS

Founded in 1993, Forteris Wealth Management is a fee-only, independent financial planning and wealth management firm in Purchase, NY [Read more](#)

### CONTACT INFORMATION

200 Business Park Drive  
Suite 211  
Armonk, NY 10504  
[Google Map](#)