WOLF
MONEY MANAGEMENT

**Welcome to Wolf Money Management Inc.** We provide:

- Holistic financial counsel
- Investing made simple
- Personalized solutions for your priorities & goals

Our independent CERTIFIED FINANCIAL PLANNER™ PROFESSIONALS, brothers Steve and Paul Wolf, recognize there's a balance to be struck between growth potential and safety.

When it comes to the growth portion of portfolios, we certainly 'stand on the shoulders of giants' like Fidelity, Blackrock, and T. Rowe Price. Fidelity is a trusted household name and a virtual 'supermarket' of investments. Their Institutional platform provides our client accounts access to no-load mutual funds with reduced internal expenses along with ETFs. Learn about our multiple "pillars" approach to investing.

As a central part of the financial 'team' that includes your accountant and an estate/elder law attorney, we can also help you:

- ☑ Minimize income taxes and avoid estate expenses
- ☑ Shield wealth from potential expenses like long-term care
- ☑ Create pension-like, guaranteed income streams

We invite you to contact us for a complementary consultation.


**Wolf Money Management, Inc.**

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**Contact Us**

Your Name (required)

Your Email (required)

Your Phone Number

Your Question / Message

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