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Meet the members of Marotta Wealth Management

Our Services

Our goal is to help our clients meet theirs.

Our Articles

We have a plethora of financial advice written from 1998 until present.

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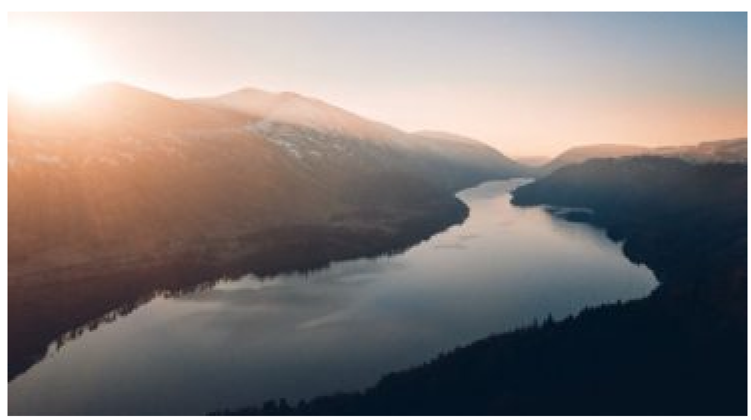
Interested in becoming a client? You can read about the process here.

Latest Articles

Many Funds Close, Others Should

by **DAVID JOHN MAROTTA** on **JULY 8, 2019**

There is a science to portfolio construction. Selecting a random group of companies is just as bad as selecting a random group of funds.



RiversEdge In-Service Withdrawal Request Form

by **MEGAN RUSSELL** on **JULY 5, 2019**

To do an in-service rollout of your vested profit sharing balance, you use the “RiversEdge In-Service Withdrawal Request Form.”

Investments, Portfolio Management

Retirement Plan Management, RiversEdge Tutorial

#TBT Your Asset Allocation Should Be Priceless

by **DAVID JOHN MAROTTA** and **MEGAN RUSSELL** on **JULY 4, 2019**

Rebalancing from stocks into bonds reduces your returns on average since bonds have a lower average return. But, as this 2015 article reminds us, there are decades of very choppy markets where even rebalancing an allocation of stocks and bonds can boost returns.

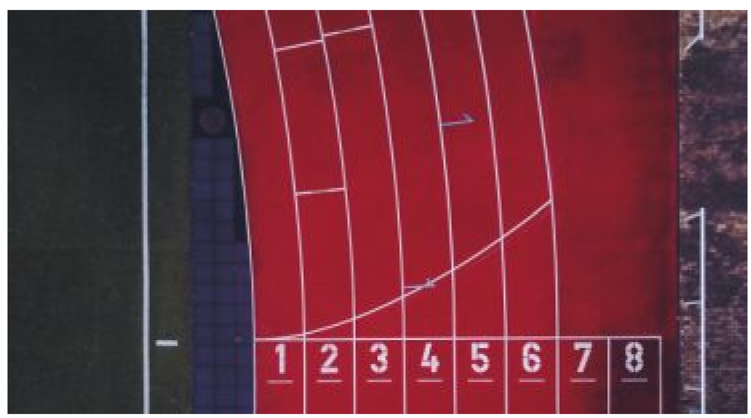
Throwback

Q&A: I have a Marotta-Managed 401(k). What should I invest in?

by **DAVID JOHN MAROTTA** on **JULY 2, 2019**

We often get the question from plan participants, "What should I invest in?" Here are our recommendations in order.

Q & A, Retirement Plan Management



Do Top-Ranked Funds Repeat?

by **DAVID JOHN MAROTTA** on **JULY 1, 2019**

Dimensional's analysis found that top funds do not repeat.

Investments, Sectors and Asset Classes, Videos

What is the Correlation of the Asset Classes?

by **DAVID JOHN MAROTTA** on **JUNE 28, 2019**

Asset classes are best defined by looking at the correlation of their returns. These four 2015 articles take a close examination at the three appreciation asset classes.

Asset Allocation, Eureka!, Sectors and Asset Classes

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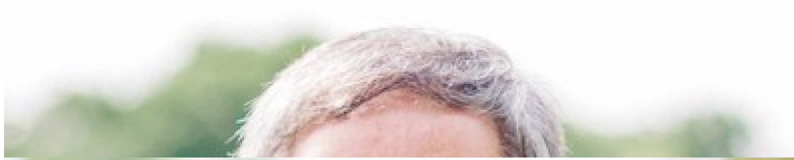

Our goal is to help our clients meet theirs.

Marotta Wealth Management is a team of fee-only financial advisors. We are fiduciaries who sit on your side of the table to help you meet your financial goals. Our clients receive a high level of customer service and comprehensive financial advice.

Clients who benefit the most from our wealth management services are small business owners, university professors, or other super-savers who are busy productively saving wealth and want to delegate the financial management to a team of professionals.

If you want to get started quickly, simply call the firm at 434-244-0000 or contact us online to start the process of becoming one of our valued clients.

You can also read our ADV Part 2 descriptive brochure for more information about how Marotta Wealth Management works.

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