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PBMares Wealth Management is a team of wealth advisors, backed by researchers and national thought leaders, who are dedicated to helping people just like you achieve your most important goals. Our advice is guided by a fiduciary standard of trust, which places the interests of our clients ahead of our own.

plans, trusts, and foundations. Unlike the majority of those in the financial services industry, our advice is guided by a fiduciary standard of trust, which places the interests of our clients ahead of our own. With that trust comes the assurance that the recommendations we make are objective, free of conflicts of interest, and always in the best interests of our clients. It's the foundation of our business model, and one of the things that sets us apart from our competition.

We do things differently. Rather than try to pick the next winning stock or hot fund manager, we believe in building broadly diversified investment portfolios that capture the returns that the markets provide. We build our investment strategies on a foundation of peer-reviewed academic research and the knowledge and insights of our team of advisors. We call this process the "science of investing." It places evidence and experience ahead of opinion and it serves as the blueprint for the wealth management plans that we design.



Your wealth management blueprint will be designed by advisors who place evidence and experience ahead of opinion.

True wealth management entails more than managing investment portfolios. We examine the total financial picture of your retirement and estate planning needs—your goals, your interests, and your assets. From there, we create a holistic plan tailored to help you and the most important people in your life meet your long-term goals. It's a customized, integrated approach that combines sophisticated investment management, financial planning, and tax minimization strategies—all under one roof.

Is your financial future secure? Contact a specialist today.



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