

(<https://www.marquiswealthgroup.com>)

HOME (</index.php>) ABOUT US (</index.php/about-us>) OUR TEAM SERVICES FEES (</index.php/fees>)
RESOURCES (</index.php/resources>) CONTACT US (</index.php/contact-us>)



PERSONAL FINANCIAL ADVISORY SERVICES

Marquis Wealth Management Group offers a wide array of **personal financial advisory services**. At Marquis Wealth Management Group, we carefully **listen to the client, assess their individual needs**, develop an **understanding of their goals**, and then suggest a **customized course of action** for their consideration. As noted in the team member tab, Rick Krichbaum, Trevor Whitley, Brian O'Connell and Abbey Shupe each are **CERTIFIED FINANCIAL PLANNER™** professionals. Our professional staff (see the team member bio section for the credentials for each individual) is committed to promoting a highly personal, positive and confidential environment and are dedicated to working with clients to obtain the best investment, financial planning, and, as needed, insurance products and services available.

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Marquis is a **Registered Investment Advisor** and our investment advisory services are provided in a non-commission environment to **business people, families and individuals in Fort Myers, Naples, Bonita Springs, Southwest Florida and throughout the USA.**

[ACCESS YOUR SCHWAB ACCOUNT \(/Schwab_access.html\)](/Schwab_access.html)

[ACCESS YOUR FIDELITY ACCOUNT \(https://www.fidelity.com/\)](https://www.fidelity.com/)

OUR SERVICES



<http://www.hosteroo.com/~marquis/index.php/services/business-financial-consulting>



<http://www.hosteroo.com/~marquis/index.php/services/business-retirement-plans-and-employee-benefits>



<http://www.hosteroo.com/~marquis/index.php/services/investment-management-services>



<http://www.hosteroo.com/~marquis/index.php/services/personal-financial-planning>



<http://www.hosteroo.com/~marquis/index.php/services/insurance-review-services>



<http://www.hosteroo.com/~marquis/index.php/services/compilation-of-personal-asset-liability-statements>

Founded in **Fort Myers** in January of 1999, **Marquis Wealth Management Group** is a **Registered Investment Advisor** specializing in **advising high net worth individuals, families, and their businesses** in all **financial matters**.

Our principal **business** includes **investment advisory** and personalized **financial planning services**, but we also consult on both **personal** and **business insurance** and **retirement plans**.

[Find Our More \(/index.php/about-us\)](/index.php/about-us)

MARKET WATCH

Name	Value	Change	% Change	Open	High	Low	Prev
EQUITIES							
S&P 500							
Nasdaq 100							
Dow 30							
Nikkei 225							
Apple							
Google							
COMMODITIES							
E-Mini S&P							
Euro							

Market Quotes by [TradingView \(http://www.tradingview.com\)](http://www.tradingview.com)

IMPORTANT DISCLOSURE INFORMATION
(/INDEX.PHP/IMPORTANT-DISCLOSURE-INFORMATION)

TERMS & CONDITIONS
(/INDEX.PHP/TERMS-CONDITIONS)

PRIVACY POLICY
(/INDEX.PHP/PRIVACY-POLICY)

ADMIN AREA
(/INDEX.PHP/ADMIN-AREA)

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