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# For local executives

Who need to visualize their family's financial future.

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# For busy professionals

Who want to organize their financial life.

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# For current & future retirees

Who are ready to realize their lifelong goals.

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## **Wealth is a good thing. Lifelong wealth is even better.**

At [Diversified](#), our clients know that while life isn't without change and challenge, it's how they manage it that makes all the difference. They also know that they need to surround themselves with people who truly care about them. As a local family business serving executives, professionals, and retirees in Delaware and Pennsylvania, we welcome the opportunity to be included in your circle of trusted advisors. We realize we'll need to earn it, and once we do, we promise to keep it.



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## **Change makes most of us a little uneasy.**

It intrudes on our peace of mind and the “what ifs?” can make us apprehensive. While we wish control over the transitions we face, life just doesn’t work that way. As the old saying goes: “The only constant in life is change.” It leaves us with a choice: prepare for life’s transitions or simply cross our fingers and hope for the best.

They know life is full of transition and risk. It's how they manage it which makes all the difference. They understand risk must be tempered by a sound strategy. As our name implies, "diversification" is a risk management technique we utilize on behalf of our clients. It accomplishes the goal of creating a sound balance between risk and reward. At Diversified, we create lasting financial solutions which support your goals because we believe your wealth should last a lifetime!

## **What matters most to you?**

What is most meaningful in your life? Our goal is to give you the financial confidence to enjoy life to its fullest. Perhaps that means present and future security for you and your family. Perhaps your goals are focused on life-fulfillment or are charitably-inclined. Whatever gives your life meaning, we'd like to help you achieve it. As a family-owned business based in Wilmington, Delaware, we welcome the opportunity to be included in your circle of trusted advisors. We realize we'll need to earn that trust. But once we do, we promise to keep it.

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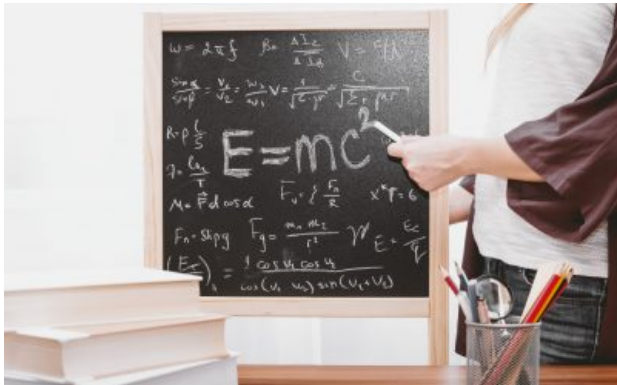
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## Let's Connect Socially

We regularly share thoughts on the pursuit of Lifelong Wealth.



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[David Levy](#)

## We'd love to hear from you.

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