

## A Richer Life

True wealth is measured on the strength of family. We invest in our clients and their loved ones before we invest for them.



## Client Stories

### Going Above and Beyond During Personal Crisis

At times, our job is crisis management. That's how it was for one client who lost her husband to a fast-progressing form of cancer. She had two young children to support.

### One Generation to the Next: A Legacy of Hard Work

We explored with one family how building a legacy is more than inheriting wealth. It's about passing down ambition and a strong work ethic.

### An Investment in Family is Worth So Much More

Every once in a while, we encourage clients to spend. In this case, it was about spending more money in order to spend more time with the kids and grandkids.

## Comprehensive Services

### Wealth Planning

We could just as easily call it life planning. Wealth planning is about providing for the here and now, and building a legacy for generations. Key services include financial, estate and tax planning and insurance management.

### Investment Management

What level of risk is right for you, right now? What about one, five or ten years down the road? When trying to achieve the highest expected returns for you, we see a moving target. Constant re-evaluation and ongoing rigorous analysis is our approach for success in the long run.

### Technology

We believe that technology can complement what Evermay brings to the table. We invest in the latest technology to help clients with everything from customized financial plans to secure access to their information.

## Newsroom

## **Taking An Interest In Rates**

June 28, 2019—What a difference a few quarters can make. After roughly two years of steady interest rate increases by the Fed, markets are now anticipating some level of rate cuts in the near future (perhaps as early as July). [Learn More](#)

## **4 Things Financial Advisors Want Their Clients to Know About Long-term Care Insurance**

April 4, 2019—With healthcare costs outpacing inflation over the past several years (and likely continuing), it is incumbent upon us, as financial advisors, to provide education and to discuss options for what could potentially be a significant expense for clients in their latter years. [Learn More](#)

## **You Just Inherited Money. Now What?**

March 15, 2019—Receiving an inheritance leads to a host of important financial decisions, as the baby-boomer generation is about to discover. Elizabeth S. Larson, CFA, senior wealth advisor and principal at Evermay Wealth Management gives expert advice. [Learn More](#)

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