

# WEALTH MANAGEMENT GROUP, LLC

*Making your wealth work for you*

[\(https://wealthmanagementgroupllc.com/\)](https://wealthmanagementgroupllc.com/)

## Navigating Life's Transitions

We specialize in serving pre-retirees and retirees as they enter and live in retirement, helping them pursue and maintain their desired lifestyle.

[Learn More \(/services/\)](/services/)

BrokerCheck<sup>®</sup>  
by FINRA

<https://brokercheck.finra.org>

CFP<sup>™</sup> CERTIFIED  
FINANCIAL  
PLANNER<sup>™</sup>

FPA  
FINANCIAL PLANNING  
ASSOCIATION

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# What Makes Wealth Management Group, LLC Different?

A few of the characteristics that we believe differentiate us are: independence, flexibility, security, our competitive fees, service, and education.

[Learn more \(/what-makes-us-different/\)](/what-makes-us-different/)



### **Wealth Protection**

Reduces the financial impact of property and casualty losses, lawsuits, disability or long-term

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## **Wealth Enhancement**

Focuses on maximizing employee benefits, reducing taxes and having a carefully designed investment portfolio that places the correct amount of emphasis on risk tolerance, financial goals and rates of return.



## **Wealth Transfer**

Uses tax-efficient strategies to transfer wealth to your intended beneficiaries during your lifetime and after you've gone.



## **Charitable Giving**

Identifies tax-efficient methods to transfer wealth to deserving charities that will support charitable causes in line with your own.



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## Focused on You

As an independent firm, your needs come first in all that we do. We develop personalized strategies that encompass your entire financial picture.

[Learn More \(/what-makes-us-different/\)](/what-makes-us-different/)

## Take the First Step Today

If you'd like to learn more about how we may be able to help you, contact us for a no-obligation, no-fee consultation.

[Let's Chat \(/contact-us/\)](/contact-us/)

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## Market News



[\(https://wealthmanagementgroupllc.com/2019/06/on-the-move-our-new-office-location/\)](https://wealthmanagementgroupllc.com/2019/06/on-the-move-our-new-office-location/)

### **On The Move: Our New Office Location** **(<https://wealthmanagementgroupllc.com/2019/06/on-the-move-our-new-office-location/>)**

By Bob Rothe, CFP® We are happy to announce the opening of our new office location. But don't fear, we haven't moved far! In fact, Wealth ... [Read More...]

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[\(https://wealthmanagementgroupllc.com/2019/06/congratulations-to-henry-lessner-cfp/\)](https://wealthmanagementgroupllc.com/2019/06/congratulations-to-henry-lessner-cfp/)

### **Congratulations To Henry Lessner, CFP®** **(<https://wealthmanagementgroupllc.com/2019/06/congratulations-to-henry-lessner-cfp/>)**

By Bob Rothe, CFP® At Wealth Management Group, we are committed to our community, to making a difference where we can, and giving back out of our ... [Read More...]

## **WEALTH MANAGEMENT GROUP, LLC** [pre...]

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(<https://wealthmanagementgroupllc.com/2019/06/why-i-became-a-financial-advisor-4/>)

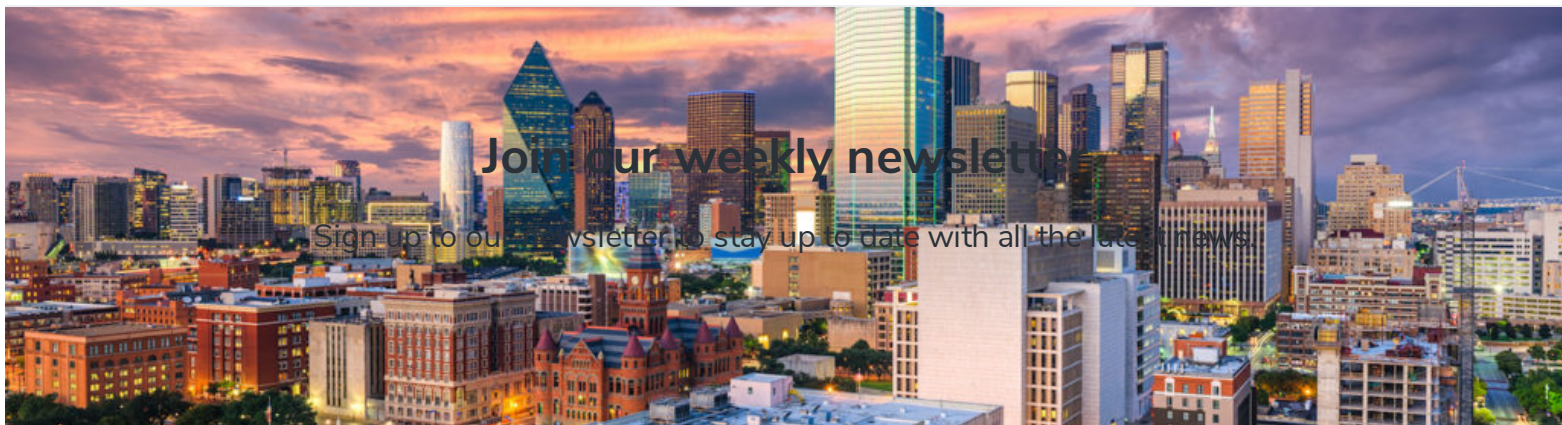
### **Why I Became A Financial Advisor** (<https://wealthmanagementgroupllc.com/2019/06/why-i-became-a-financial-advisor-4/>)

By Robert Lachica, CFP® At Wealth Management Group, LLC, we are proud of our team. We'd like to share a little more about each team member in a ... [Read More...]

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## Disclosures

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