Core Wealth Management – A Fee-Only, Fiduciary Financial Planning and Investment Management Firm

Serving Palm Beach, Martin and St. Lucie Counties

Welcome to Core Wealth Management, a financial advisory firm located in Jupiter, FL. At Core Wealth Management, our goal is to be your primary resource to help grow, protect and manage your wealth through all of the inevitable challenges and opportunities that life will bring to you and your family. Whether you are seeking unbiased financial planning advice, independent investment management, retirement planning or comprehensive, integrated wealth management solutions, meeting your unique needs is our highest priority.

As a fiduciary, we offer a full range of financial advisory services to meet the objectives of individuals and their families, including:

Fee-Only Financial Planning

Investment Management

Learn more about our comprehensive financial planning and investment management services here.

WHAT SETS US APART

Our team of highly-trained professionals is committed to serving your best interests exclusively. Whether you are seeking customized financial planning, independent asset management services or 401k plans for small businesses, we offer fee-only solutions to meet your unique needs.

As a Registered Investment Advisor Firm and fiduciary, we pride ourselves on taking a personal approach to financial planning that encompasses all aspects of your financial situation. Our comprehensive wealth management services are designed to help individuals and families preserve and grow their wealth in a prudent manner that is consistent with their risk appetite and long-term objectives.

OUR COMMITMENT TO YOU

OUR INTEGRATED APPROACH

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We offer fee-only independent financial planning and investment management services to individuals nationwide.   Our qualified professionals are committed to provide thorough and unbiased financial advice that is always in your best interest. By establishing ourselves as a Registered Investment Advisor Firm, we enter into a legally binding fiduciary relationship with each of our clients. By design, we must put your highest interests ahead of our own.

Furthermore, as a fee-only investment advisory and financial planning firm or 'fee-only advisor', our sole source of compensation comes from our clients in the form of flat fees, hourly fees or a percentage of assets under management. We do not accept commissions, kickbacks, gifts, soft dollars, sales incentive trips or any other payments from third parties. As a result, conflicts of interest are minimized and you benefit from knowing that we work exclusively for you.

At Core Wealth Management, we take the time to understand your objectives and identify your unique financial goals and concerns. With this knowledge, we are able to develop an appropriate strategy for your asset management needs and help you make the best choices for you and your family. By leading with planning, we are able to help you shift the focus away from the day-to-day market noise and clarify the true purpose of an investment portfolio – a tool for achieving your most cherished financial goals.

OUR INTEGRATED APPROACH

There are many aspects to wealth management and each component impacts the others – each opportunity must be evaluated in the context of your entire financial situation – decisions cannot be made in a vacuum. The advisors at Core Wealth Management have the collective expertise in financial planning, investment management, risk management and tax planning to evaluate your entire financial picture and develop comprehensive, integrated solutions that will bring you closer to meeting your life goals.

MEET OUR TEAM

Todd Schanel, CFA, CPA, CFP®
Principal and Director of Investment Advisory Services

Todd's vision was to build a firm that offers independent and objective financial advice,

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Jackie Goldstick, CFP®

Director of Financial Planning Services

Jackie's passion for assisting individuals and families with their financial planning needs has shaped her interest in ensuring that each Core Wealth client establishes a strong financial plan as step one in their relationship. She has extensive experience building practical, evolutionary financial plans for a wide range of risk profiles and circumstances.

LEARN MORE >>

Your Fee-Only Financial Advisor

clients, Core Wealth Management is a fee-only firm; our sole source of compensation is from our clients, in the form of flat-fees, hourly fees or a percentage of assets under management. Our services and fee structures are flexible and transparent, structured to meet your financial means and needs.

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June 13, 2019

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May 31, 2019

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May 16, 2019

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May 7, 2019

Money Management Lingo

April 11, 2019

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Serving All of Palm Beach County including North Palm Beach, West Palm Beach, Palm Beach Gardens and Jupiter.