



HOME

EVENTS

PORTFOLIOS

SERVICES

CLIENT CENTER

INVEST NOW



You know you **should**...now you **can**.

LONG TERM INVESTING • FINANCIAL ADVICE • EDUCATION

Our goal is simple.

We're a fiduciary financial advisory firm with 3 goals for our clients.



1

HOME

EVENTS

PORTFOLIOS

SERVICES

CLIENT CENTER

Invest for you to hit your goals using a mix our Jazz Wealth, **zero fee funds.**  
INVEST NOW

2

Help you invest exactly what's needed in all your account to hit your investing goals.

3

Weekly, **live and archived** classes to help you constantly improve your net worth.

GET STARTED NOW

## How does it work?

---

1

Start by opening your account.

We've simplified the entire experience to save you time.

Not sure which account you need? **Chat with jazz.**

2

How should we invest for you?

After we get your account open we'll send you our investment profile so we can invest according to your

goals.

3

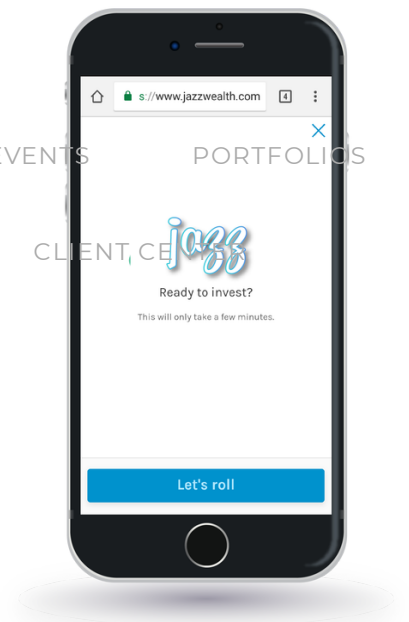
jazz

Fund your account or transfer old one.

Easily link your bank account to begin funding your new account. Have an account to transfer or rollover?

We'll make that simple too!

[SCHEDULE CALL](#)



Our fee goes down as you grow.

Our **yearly fee** is based on your account value and is debited directly from your account.



✓ **No Expense**  
Custom Portfolio's

✓ **Advice on all**  
investments.

✓ **Know "Your number"**  
Investment plan

✓ **\$75 minimum**  
yearly.

✓ **Private, weekly**  
classes for clients

✓ **Cancel**  
anytime.

HOME

EVENTS

PORTFOLIOS

SERVICES

CLIENT CENTER

INVEST NOW

**\$1 - \$25,000: 1.5%**  
**\$25,001 - \$50,000: 1.25%**  
**\$50,001 - \$100,000: 1%**  
**\$100,001 - \$250,000: 0.75%**  
**\$250,001 & up: 0.50%**

No minimum to start.

**GET STARTED**

How to get starte...



How to invest to ...



How to invest if y...



Find us on YouTube. Lots of helpful, specific videos. Still have more questions? **Let's chat!**

**JAZZ FAQ'S**



HOME

EVENTS

PORTFOLIOS

We invest for you.

SERVICES

CLIENT CENTER

INVEST NOW



We invest according to your goals, not ours.

As Fiduciaries that own our own funds, we are free to invest exactly as is best for you with no potential for conflict.



Portfolio's you can understand.

We offer portfolio's of all different risk levels and growth potential. Unlike everyone else, we show you how they **perform.**

SCHEDULE A CALL



Want to chat about it?

CHAT WITH JAZZ

Custom Tailored Investments | W...



*Spend 15 minutes getting some help from jazz.*



Custody and Data Provided By:

SERVICES

CLIENT CENTER

[Home](#)[About](#)[Contact](#)[HELP CENTER](#)

Jazz Wealth Managers, Inc. (CRD #282807 / SEC# 801-113840) is registered as an SEC registered investment advisory firm.

Past performance is not a guarantee of future results. Any historical returns, expected returns, or probability projections may not reflect actual future performance. The material contained herein has been prepared from sources and data we believe to be reliable but we make no guarantee as to its accuracy or completeness. The material is published solely for informational purposes and is not an offer to buy or sell or solicitation of an offer to buy or sell any security or investment product. This material is not to be construed as providing investment services in any jurisdiction where such offers or solicitation would be illegal.

You should be aware that investments can fluctuate in price, value and/or income, and you may get back less than you invested. Investments or investment services mentioned may not be suitable for you, and if you have any doubts, you should seek advice from your investment advisor representative.

By viewing this site you agree to our [privacy policy](#).

© Copyright 2019 Jazz Wealth Managers, Inc.