



SERVICES

PROCESSES

OUR TEAM

CONTACT

Our mission is to be Life Advisors for our clients with an emphasis on financial issues. Our competitive advantage is our ability to design and implement a financial roadmap that is consistent with our clients values. This written financial strategy will become the blueprint for living the life you have always dreamed.



# WHARTON Business Group

The Wharton Business Group (WBG) is an independent firm providing comprehensive consulting services to individuals and owners of closely held businesses. These people typically place a high value in delegating their financial decisions to a competent, trustworthy professional. They typically have significant investable assets, but would rather spend their time caring for, or attending to more important things in their lives.

At WBG, we assist our clients in areas relating to Retirement, Estate and Cash Flow Planning, as well as the determination of Investment Objectives and formation of an Asset Allocation.

We provide our clients the guidance needed to create, grow, protect and distribute their assets with an emphasis on tax efficiency. In addition, we keep our clients updated on the changes in tax laws and proliferation of financial products.

**THE RETIREMENT SAVINGS DILEMMA**

*Click to view this short video, then let's discuss your future financial plans.*

CLIENT LOGIN

[HOME](#) [SERVICES](#) [PROCESSES](#) [OUR TEAM](#) [CONTACT](#)

Securities and advisory services offered through FSC Securities Corporation, Member FINRA/SIPC. Insurance services offered through Wharton Business Group, which is not affiliated with FSC Securities Corporation.

© 2016 Wharton Business Group | 110 N. Phoenixville Pike, Malvern, PA 19355

#### IMPORTANT CONSUMER INFORMATION

A broker-dealer, investment adviser, BD agent, or IA rep may only transact business in a state if first registered, or is excluded or exempt from state broker/dealer, investment adviser, BD agent, or IA registration requirements as appropriate. Follow-up, individualized responses to persons in a state by such a firm or individual that involve either effecting or attempting to effect transactions in securities, or the rendering of personalized investment advice for compensation, will not be made without first complying with appropriate registration requirements, or an applicable exemption or exclusion. For information concerning the licensing status or disciplinary history of a broker-dealer, investment, adviser, BD agent, or IA rep, a consumer should contact his or her state securities law administrator.

This communication is strictly intended for individuals residing in the states of AZ, CA, CO, CT, DE, FL, GA, IA, IL, MA, MD, MN, MO, MT, NE, NH, NJ, NY, OH, OR, PA, SC, TX, UT, VA, WI. No offers may be made or accepted from any resident outside of the specific state(s) referenced.