Welcome to

TELLURIDE WEALTH MANAGEMENT

ENGINEERING PEACE OF MIND

Telluride Wealth Management LLC is an independent wealth management firm specializing in holistic wealth management, including investment management and financial planning.

The firm was created by financial advisors from a large, Wall Street-based brokerage firm who, after nearly two decades, determined to make a change.

They decided to focus on quality over quantity. To ensure that clients' goals came first. To work with like-minded individuals, business owners and families who strive for success without losing sight of core principals. Family. Friendships. Learning. Essentially, clients with whom they could leverage their expertise in order to promote their quests for fuller, more satisfying lives. Based in the Midwest, the firm's partners have opened another office while returning to their roots. Colorado.

If you live day by day, your financial advisory relationships will reflect that. If you endeavor to attain your dreams and maximize the journey, you will require the assistance of a sophisticated, client-focused wealth management firm. Free from conflicts of interest, our methodology will remind you of what it means to be a client, as opposed to just another customer.

HOLISTIC WEALTH MANAGEMENT

You need only attain wealth one time. After which, wealth management and preservation take priority. Eventually, you will want it transferred to those you love.

Effective wealth management integrates the planning, investment and risk management strategies under one umbrella. Only after defining one's objectives and values can one begin to determine the components of an investment, planning and risk management strategy.

We assist in defining your goals. Learn what makes you tick. Ascertain what is of value to you. Then, we engineer a plan capable of achieving your objectives. Determine how to get there. How to preserve it. How to get it to those you love.

FINANCIAL PLANNING

All journeys begin with a plan. Especially the path to financial independence. Regardless of where that path leads, we endeavor to ensure your safe arrival.

We begin by mapping out your priorities, objectives, assets and vulnerabilities. Following, we develop a plan to protect you and your loved ones from life's financial storms. That assures that your assets remain yours. And the fruits of your labor benefit you and those of your choosing.

Our success? The by-product of your peace of mind. The peace of mind in knowing that you've done everything required to achieve financial independence. That your life's work will benefit those you love. In a means you've chosen.

INVESTMENT MANAGEMENT

Since the century's turn, investors have faced two volatile bear markets. Many investors, utilizing a buy-and-hold approach, twice suffered a massive contraction in their personal financial assets.

That need not happen again.

Our investment methodology was born of a five-point philosophy. Together, the firm's philosophy and methodology have stewarded clients through all market periods. Good, bad and indifferent.

No one controls the market’s direction. Using technical analysis, we can, however, control our exposure when markets incur those inevitable and precipitous declines. Enabling us to benefit when markets rise. And preserving capital when markets decline.

EMPLOYEE-SPONSORED RETIREMENT PLANS

Employer-sponsored retirement plans, and the 401(k) specifically, have become America’s primary source of retirement savings. The growing importance of these plans has created a heightened level of complexity and scrutiny.

Effectively managing these plans doesn't have to be an over-whelming task. Still, most plan sponsors require expert counsel in the plan’s ongoing management. We can help.

Telluride Wealth Management helps plan sponsors navigate the changing retirement plan landscape.

Our approach to risk and performance management is holistic. We focus on all forms of plan performance. As an independent firm, we are product agnostic. We utilize years of experience to become an extension of your human resource and finance departments. Together, we can ensure that all aspects of your retirement plan perform at the highest level.

Our relationship begins with a detailed assessment of your plan's performance, the identification of areas for improvement, and the creation of a detailed project plan to close performance gaps. The thorough analysis done in year one is refreshed annually thereafter so that we can ensure that you establish and maintain a best-in-class retirement plan.

As an independent firm, we are committed to helping clients:

- *Manage and reduce the risk associated with sponsoring a plan*
- *Improve plan performance through improved investment structure and performance, streamlined administration, optimal plan design, and up-to-date analysis of the changing regulatory and industry environment*
- *Control total plan costs and maximize the relationship with plan service providers*
- *Help participants prepare for retirement*

Our process includes:

- *Assessing your priorities and objectives*
- *Collecting all plan-related documents*
- *Reviewing all data to generate an overview of the plan’s performance*
- *Presenting a gap analysis and determining your priority action items*

- *Monitoring the implementation of the plan and measuring its impact*

Finally, we endeavor to help you:

- *Create a fiduciary governance plan designed to manage the risks associated with running a corporate retirement plan.*
- *Assist all participants in getting started with our goals-based, interactive financial planning resources.*

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Visit our sister site Hyde Park Wealth Management