

# MADISON WEALTH MANAGEMENT SERVICES

*Trusted financial planning and investment management firm founded in 2000*

## CUSTOMIZED FINANCIAL PLANNING

We provide in-depth and ongoing financial planning services designed to help successful people make smart decisions.

## INVESTMENT & PORTFOLIO MANAGEMENT

We understand the art and science of asset allocation, asset location, and creating customized and diversified portfolios to achieve your goals and maximize returns while managing risk.

## RETIREMENT PLANNING

We help our clients prepare for retirement in a holistic fashion, making sensible financial choices while addressing the needs of the family as they will be retired.

## STOCK OPTION PLANNING

We expertly manage concentrated positions and low-basis stock, helping our clients build financial wealth and plan for the needs of their family for college and retirement.

## TRUST & ESTATE ADVISEMENT

We work closely and confidentially with other professionals – attorneys, tax advisors, insurance advisors - to efficiently manage tax implications.

## EQUITY & FIXED INCOME RESEARCH

We have extensive experience on both the buy and sell-side, using proprietary models and sophisticated tools to support your investment research.

## WHAT WE DO

*We work closely and confidentially with individuals, multi-generational families, business owners and entrepreneurs as an independent, fee only advisor and Fiduciary.*

# MADISON INSIGHTS

*Latest News & Ideas*

## SIGN UP FOR OUR NEWSLETTER HERE

Financial & Retirement Planning



10 June, 2019

BEST STATES TO RETIRE

Madison Market Intelligence



18 June, 2019

THE DEATH OF VALUE, NOT SO FAST!

Quarterly Market Review



22 April, 2019

FIRST QUARTER MARKET REVIEW

**Madison in the Community**



10 June, 2019

MADISON'S RICK ENGLAND MODERATES WORLD BANK EVENT FOR DC PUBLIC SCHOOLS

**Madison Announcements**



27 June, 2019

MADISON WEALTH MANAGEMENT NAMED TO 2019 FINANCIAL TIMES 300 TOP REGISTERED INVESTMENT MANAGERS

**YOUR TRUST, INVESTED WISELY<sup>SM</sup>**

*We are dedicated to helping you reach your goals.*

## Protecting Your Assets & Information

At Madison, your financial security is paramount. We work only with industry custodial leaders to protect your value against loss and unauthorized use. View your customized assets under management using **our client portal**.

