CROWLEY
WEALTH MANAGEMENT

COMPREHENSIVE WEALTH MANAGEMENT

Building Long-term Relationships

Financial Planning • Investment Management • Tax Planning • Estate Planning

WHO WE ARE

At Crowley Wealth Management, we take a comprehensive approach to wealth management. We build long term relationships with our clients in order to help them plan and achieve their financial goals.

Unlike most other financial firms, Crowley Wealth Management goes above and beyond by delivering a package of services to clients that encompasses and coordinates all areas of personalized wealth management. We offer a truly unique and all-inclusive service. The advisors at Crowley Wealth Management specialize in financial planning, investment management, tax planning, and estate planning. They have extensive backgrounds in all areas of wealth management, and over 38 years of experience helping clients reach their financial goals.

At Crowley Wealth Management, we guide our clients through all stages of wealth management including wealth accumulation, wealth distribution, and the transfer of wealth to future generations. Our firm was founded in 1980 by two brothers in Delaware, and we remain a family-owned firm serving clients all over the country. We operate as a fee-based, personal service business that you can trust. We do not sell financial products or earn commissions, and we are not a custodian.

Robert A. Crowley

CFP®, CFA®, MBA, JD

Read Bob's Bio

Fred Crowley

CFP®, MS, JD

Read Fred's Bio

Shannon A. Dalle Pazze

JD

Read Shannon's Bio

James P. Crowley

BA

Read James' Bio

Valerie J. Hastings-Candeloro

Read Valerie's Bio

WHAT WE DO

With our in-depth knowledge of all areas of wealth management, we take care of every aspect of your financial life. Our goal is to help you and your family simplify the wealth management process, reduce costs, and optimize your resources.

Contact us for a free initial consultation; we would love to introduce ourselves and discuss how we may be able to help you today.

Learn more...

FINANCIAL PLANNING
INVESTMENT MANAGEMENT
TAX PLANNING
ESTATE PLANNING

FINANCIAL PLANNING

Financial planning is at the heart of what we do for our clients. Our experienced staff will complete a comprehensive evaluation of your income, expenses, benefits, assets, and liabilities. Then they will work with you to develop a customized financial plan designed to help keep you financially independent in your retirement years and meet your future goals. We not only help you plan for events like retirement, and family or charitable gifting, but we also help you evaluate, understand, and manage any risks in the process.

Rated one of the top 100 fee-only wealth management firms in America.

2014 TOP 100 FEE-ONLY WEALTH MANAGEMENT FIRMS

2015 TOP-RATED WEALTH MANAGEMENT FIRMS

QUALIFIED CHARITABLE DISTRIBUTIONS

Are you curious about strategies involving charitable giving from your IRA accounts? Check out this article that describes how careful planning of qualified charitable distributions may yield some great tax benefits.

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Source: Investment News

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