



Our Team

Meet the members of Marotta Wealth Management



Our Services

Our goal is to help our clients meet theirs.



Our Articles

We have a plethora of financial advice written from 1998 until present.



Get Started

Interested in becoming a client? You can read about the process here.

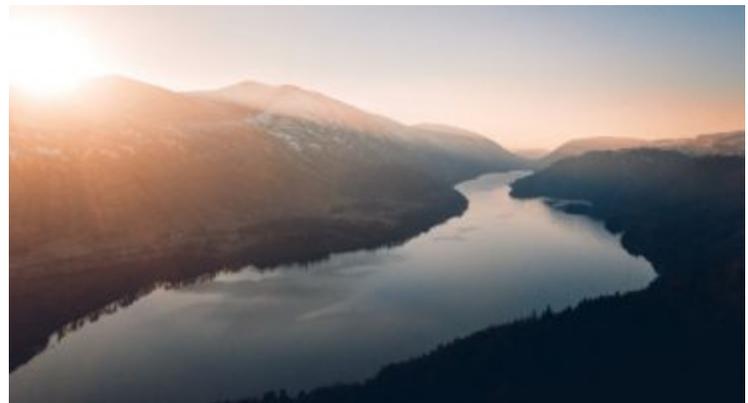
Latest Articles



Many Funds Close, Others Should

by DAVID JOHN MAROTTA on JULY 8, 2019

There is a science to portfolio construction. Selecting a random group of companies is just as bad as selecting a random group of funds.



RiversEdge In-Service Withdrawal Request Form

by MEGAN RUSSELL on JULY 5, 2019

To do an in-service rollout of your vested profit sharing balance, you use the "RiversEdge In-Service Withdrawal Request Form."



#TBT Your Asset Allocation Should Be Priceless

by DAVID JOHN MAROTTA and MEGAN RUSSELL on JULY 4, 2019

Rebalancing from stocks into bonds reduces your returns on average since bonds have a lower average return. But, as this 2015 article reminds us, there are decades of very choppy markets where even rebalancing an allocation of stocks and bonds can boost returns.

📁 Throwback

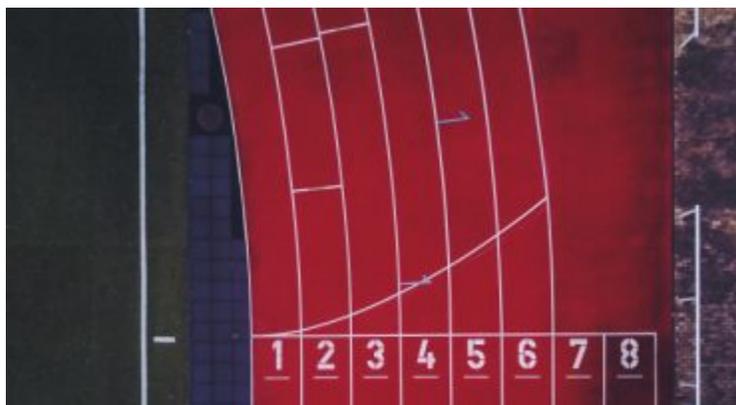


Q&A: I have a Marotta-Managed 401(k). What should I invest in?

by DAVID JOHN MAROTTA on JULY 2, 2019

We often get the question from plan participants, "What should I invest in?" Here are our recommendations in order.

📁 Q & A, Retirement Plan Management



Do Top-Ranked Funds Repeat?

by DAVID JOHN MAROTTA on JULY 1, 2019

Dimensional's analysis found that top funds do not repeat.

📁 Investments, Sectors and Asset Classes, Videos



What is the Correlation of the Asset Classes?

by **DAVID JOHN MAROTTA** on **JUNE 28, 2019**

Asset classes are best defined by looking at the correlation of their returns. These four 2015 articles take a close examination at the three appreciation asset classes.

 [Asset Allocation](#), [Eureka!](#), [Sectors and Asset Classes](#)

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Our goal is to help our clients meet theirs.

Marotta Wealth Management is a team of fee-only financial advisors. We are fiduciaries who sit on your side of the table to help you meet your financial goals. Our clients receive a high level of customer service and comprehensive financial advice.

Clients who benefit the most from our wealth management services are small business owners, university professors, or other super-savers who are busy productively saving wealth and want to delegate the financial management to a team of professionals.

If you want to get started quickly, simply call the firm at 434-244-0000 or contact us online to start the process of becoming one of our valued clients.

You can also read our ADV Part 2 descriptive brochure for more information about how Marotta Wealth Management works.

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Our Services





Asset Allocation Design



Portfolio Management



Relationship Advisor