Knowledge. Integrity. Impact.

At Exeter Wealth Management, it is our mission to provide our clients a plan to pursue wealth accumulation, preservation, and distribution of assets. We do this by creating and implementing strategies that are tailored to their unique goals. We fully understand that everyone's situation is different, being an independent firm allows us the ability to customize plans for each client's specific needs.

Driven to provide our clients with unbiased advice, we seek to create financial confidence through planning and to align each client's actions with their values.

Our goal of creating and sustaining financial independence for our clients begins by providing clarity, education, and measurable progress toward their financial goals. As financial advocates, we will tirelessly act in their best interests to make sure that our clients are living their lives by design and not by default.

BrokerCheck by FINRA

Contact Us

Contact our office to find out when an advisor will be able to meet.

All initial meetings will be done complimentary either by phone, online, or in person meeting.