Lorence & Vander Zwart
Financial Planning

Lorence & Vander Zwart takes care of your family's business so you can take care of the business of being a family.

Learn More

Our Team

Lorence & Vander Zwart believes in a collaborative approach to financial advising. Each of our three advisors will be involved in formulating your personal financial plan, and they're backed up by an experienced team of financial professionals.

Our Story

With a rich history spanning more than fifty years, Lorence & Vander Zwart has grown into a comprehensive financial planning firm that does far more for your family than just manage your investments.

Our Philosophy

Lorence & Vander Zwart's entire team is engaged with your investments. Our investment philosophy goes beyond the traditional diversification strategies of the past, taking a proactive approach to a counterbalanced portfolio.

WHY LVZ?

We aren't just a broker, advisor, or planner. We take the lead in coordinating your family's financial and business affairs, providing comprehensive service and letting you focus on what matters most. Our clients come to think of us as part of the family.

Learn More

WHAT WE DO

Lorence & Vander Zwart provides our clients with professional investment management services using individual stocks, ETFs, bonds, mutual funds, and deferred investment products.

Review and analysis of risks often includes the recommendation and analysis of insurance products, including life, disability, and long-term care.

Lorence & Vander Zwart believes that coordination with other professionals who serve our clients is paramount to the success of their financial plans.

We work with many of our clients to provide sophisticated legacy planning, including the funding of specialized trusts and specific gifting of highly appreciated investments.