Rapidly grow your profitability

By offering Wealth Management Services to your clients you can rapidly grow your profitability and create a more engaging client relationship.

Scroll down to learn more or contact us for a brief virtual meeting.

SIMPLE – PROFITABLE - EXCLUSIVE

We make it **SIMPLE** for tax professionals to evaluate and offer investment services to their clients. Adding investments to your existing practice can rapidly **GROW** your profits by leveraging your current client relationships. Our **DIFFERENTIATED** program allows you to stay focused on the client and we will handle the back office; enabling you to manage the time demands of your tax practice and provide wealth management services without adding staff.

Contact us

Why partner with us?

Firms choose Wealth Management LLC because we help you grow your business with proven tools that allow you to stay focused on the client while we handle the back office.

- CPA Friendly (Tax Conscious) -Designed by CPA’s for financial professionals
- Prudent Models (Low Cost) -Application based on academic principles
- Back Office Support -We become an extension of your back office
- Maximize Client Relationships -Systems to minimize your administrative work
- Grow Your Business

Contact Us

Open Services FAQ

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Nobel prize winning approach

Academic Approach – Wealth Management LLC makes investment decisions that are based on an academically-based model of investing, including but not limited to: the Nobel Prize winning model Fama-French Three Factor Model of 1992 and Modern Portfolio Theory and we apply a Fiduciary Mandate Process. The firm begins its asset selection with over 25,000 mutual fund options and filters this down based on our approach and the Advisor Client goals to recommendations for each asset class. This process forces low cost solutions and long-term strategies to fulfill the client goals.

Eugene Fama on Modern Finance Video Transcript

Menu

Choose the portfolio designed specifically for your client

Wealth Management LLC works with our Advisors to develop a portfolio that would fit client needs and risk tolerance. We help Advisors navigate the market. This portfolio would be diversified and rebalanced to take advantage of market dips and swings always keeping the long-term goals in mind.

Open Investment FAQ

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