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Growing Together

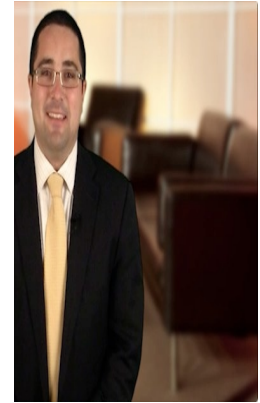
Comprehensive wealth management and planning rooted in trust and confidence.

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Financial Planning, Retirement, & Investment Services

Olive Tree Wealth is a comprehensive wealth management firm based in Waltham, MA. Founded in 2008 by Alexandre Oliveira, the firm was created to provide objective advice to high net worth individuals and corporations working through important decisions such as retirement planning, investment strategies, tax management, and estate planning. Olive Tree Wealth was founded on the belief that financial advice should be transparent while also adhering to three main principles: Clear Communication, Objectivity, and Integrity.

Those three principles are the guiding force behind our relationships with clients, as well as the framework for our recommendations. In a world of continued ambiguity and constant change, Olive Tree Wealth seeks to provide clear strategies to clients in a way that simultaneously educates them while delivering results through products best suited for their goals. Since every person's situation is unique, it only makes sense that each set of recommendations should be as well. Our clients enjoy having a truly customized solution created to fit their needs.



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Learn more about my practice and how we work with you.



Experience

Alex has more than ten years of financial planning experience, working with clients locally in New England and nationwide.

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How We Help

Building a financial plan or strategy is a process that begins with understanding your current situation and learning your plans and goals.

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Services

Alex and his team provide clients with a financial planning and investment services and access to a wide array of investment and insurance products..

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Our Resource Center features videos and articles about investments, tax strategies, and much more.



The Power of Tax-Deferred Growth

Why are 401(k) plans, annuities, and IRAs so popular?

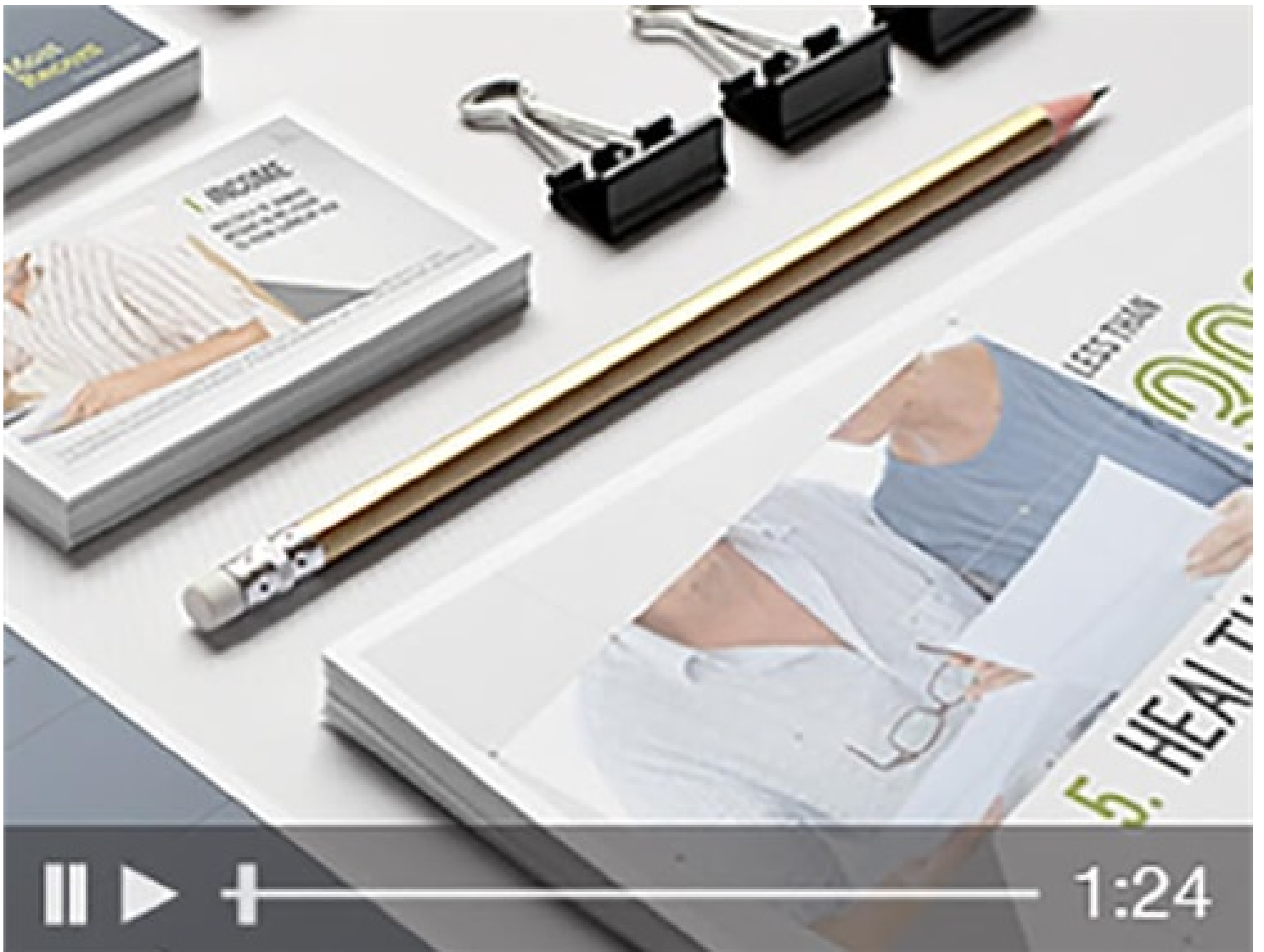
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Traditional vs. Roth IRA

One or the other? Perhaps both traditional and Roth IRAs can play a part in your retirement plans.

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Ready for Retirement?

Are you ready for retirement? Here are five words you should consider.

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Let's begin the conversation!

Name

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Phone

Question

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Olive Tree Wealth

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