

APPROACH

SERVICES

ABOUT

BLOG

CONTACT

TAKING THE HOLISTIC APPROACH

Live a satisfied, fulfilled, and inspired life.

“The Omega Method” is a financially effective and personally rewarding approach to creating a viable, long-term Financial Life Plan.

Enter peace of mind.

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ARE YOU AN ENTREPRENEUR?

Maximize your limited time and stay on top of your portfolio.

Running a business is rewarding and exciting. It can also be overwhelming when you lose track of where you're going.

Is your business truly supporting you?

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ABOUT US

Dreams: fulfilled

The Omega Wealth Management approach is both unique and powerful. We are an independent life/wealth advisor whose model is “fee-only.” Our holistic techniques align your deepest values with your financial goals. The result is a meaningful and comprehensive plan that enables you to thrive in your new life.

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529 DAY IS HERE!

529 DAY IS HERE! You may be familiar with the fantastic college savings tool known as the 529 Savings Plan. It got its name because it was established under section 529 of the tax code. In a 529 savings accounts, your money can grow tax free and be used for qualified

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LEGISLATIVE CHANGES TO RETIREMENT PLANS THAT MAY AFFECT YOU

Legislative Changes to Retirement Plans May Affect You Last Thursday, the House of Representatives overwhelming passed the Setting Every Community Up for Retirement Enhancement, or SECURE, Act. This is the first step in creating a new law to try to address the retirement savings crisis highlighted by “The Report on the

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Want to know more?

Omega Wealth Management serves as a “lifeline” to help you successfully navigate major life changes. Our comprehensive and flexible process is designed to meet you where you are and help you get to where you want to go, at your own pace.

[CONTACT US](#)

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