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WestFinancialServices

Your goals. Our strategy.

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The *Financial Times* recognized West Financial Services as one of the 300 Top Registered Investment Advisers\* in the U.S. [Learn More \(/news-insights/top-300-registered-investment-advisers\)](#).

## THE SERVICES TO REACH ANY DESTINATION

[Investment Management \(/our-services/investment-strategy\)](#)

The West Financial Services investment approach stresses diversified portfolios tailored to each client's individual circumstances. Our investment management goal is to maximize the return on each client's portfolio while keeping within the individual's risk tolerance, time horizon, tax status, and wealth objectives.

### **[Financial Planning \(/our-services/financial-planning-expertise\)](#)**

Our professional team has substantial business and personal financial planning experience. This allows us to develop and implement financial plans across a broad range of topics, and in as much depth and detail as the client's situation requires.

### **[Executive and Business Consulting \(/our-services/personal-cfo-and-family-office\)](#)**

We believe in the power of collaboration. We work with, and often lead, a network of experts with the sole purpose of helping you and your family achieve wealth management goals. Having the analytical ability, in-house expertise, and industry relationships to build and implement strategic plans for our clients, distinguishes our firm from others.

### **[Retirement Plan Consulting \(/our-services/retirement\)](#)**

West Financial Services uses our investment expertise and financial planning focus to help retirement plan sponsors and trustees meet their fiduciary obligations.

## **THE VISION TO SEE YOU THERE**

We are committed to improving the lives of our clients by providing exceptional financial services and solutions that earn trust and build lifetime relationships.

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