Attleboro Wealth Management
Independent Financial Advice

A Summary of Our Services:

AWM's Comprehensive Financial Planning, Investment Management, and Monitoring Services:

We have developed an 8-week financial planning process that helps us dig deep into your lifetime needs and goals, identify potential issues, and together realize an actionable financial plan to help you achieve a confident and comfortable retirement.

During this 8-week planning process, we'll meet every two weeks to get to know you in detail. To learn your needs and goals, to help identify any potential issues and to create and offer solutions tailored to your specific needs, goals, and issues.

We develop multiple financial plans and strategies tailored towards your specific wants and needs in retirement. This also includes any "What if" scenarios that may occur during your retirement.

We create, implement, and monitor your tax-efficient retirement income plan, in preparation for potential future tax increases.

Beyond our initial 8-week week financial planning process to develop and implement your plan, we conduct annual comprehensive financial planning reviews to help make sure you are still on track to meet your goals.

We conduct an additional annual or semi-annual planning review, where we take a deep dive into other relevant financial planning topics, which may also include estate planning, insurance planning, tax planning, and more.

Please see page 2 for a breakdown of each service.

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Investment Planning

Investment Planning includes our unique Account Segmentation strategy. We use this approach to help make sure your current expenses are secure, while offering investment strategies that allow for more growth for long-term needs and goals.

We develop these investment strategies and choose the investment portfolios that make the most sense in your segmentation strategy.

Our financial planners and investment committee members offer discretionary management of your portfolios. We handle everything for you and will take into account any input or discussion you would like to have before implementing any changes to your portfolios.

Insurance Planning and Risk Management

We help you plan for those unexpected circumstances and help make sure you are still on track to live retirement as you desire.

This includes a discovery process to identify if tools like life insurance and/or principal protected and guaranteed income vehicles are an appropriate resource to help you achieve your needs and goals for yourselves and your loved ones. We also review your property and casualty insurance to help make sure you are not over or under insured and not paying too much for your coverage.

We help you explore the risk of, and potential solutions for, Long Term Care needs.

Tax Planning

Tax Planning is a unique and powerful part of our financial planning process. While most planners and advisors do not understand, or are forbidden to discuss this important part of your retirement planning, we understand that taxes will be one of your largest expenses during retirement. We understand that failing to, or avoiding to plan and take steps to mitigate this risk, can have detrimental effects on the type of retirement you desire and deserve or to your legacy plan.

We do not avoid this conversation. We do not just hope that taxes "somehow" never increase during the next several decades of your retirement. We have spent years studying and developing specialized techniques to help you avoid tax rate risk and to help allow you to keep more of your money for yourself or your loved ones.

We look forward to the opportunity to be your trusted advisors and planners. To help give you the confidence and comfort you need, desire, and deserve in retirement and when you're no longer here, to help your legacy pass to your loved ones in the most efficient manner possible.