

What is Wealth Management ?

Investment Consulting + Advanced Planning + Relationship Management
= Wealth Management

Investment Consulting : We assess your current situation, and help you make decisions about which investments are right for your risk tolerance and investment time horizon

Plus

Advanced Planning : We listen to you; develop retirement income and estate planning strategies, business succession and charitable giving plans, and plans for financing and future needs.

Plus

Relationship Management: We work for you. As such, we feel we need to work with your Attorneys, CPAs, Accountants, and other professional advisors to assist you in developing a comprehensive approach and plan for tax management, and your other advanced planning strategies

Equals

Wealth Management

The Barlow Group at Morgan Stanley

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