OUR TOOLS

Technology allows us to elevate our client's experience and to provide customized solutions. By continuously improving and implementing the latest tools we can enhance and optimize strategies, streamline processes, identify and abate risk, and dynamically enrich people's lives.

AN INTRODUCTION TO OUR CEO: WILLIAM LIBERTI

"I began my career at Shearson Lehman Brothers and witnessed first-hand the "Black Monday- Crash of 1987" from the 103rd floor of the World Trade Center. That experience along with my many years in the finance industry have helped me hone an investment philosophy that focuses on risk mitigation strategies. Risk is never eliminated— for without risk there is no reward—but managing risk to an individual's tolerance and situation typically leads to results."

OUR CUSTODIAN

Fidelity collaborates closely with our firm to provide a range of insights, expertise, and world-class client experiences. This ongoing relationship, complemented by Fidelity's advanced wealth management platform, will continue to help us find new ways to better serve you.

Fidelity Institutional® provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC.

WealthEffects Everything!

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ENRICHINGPEOPLE'SLIVES– CONTACTUSTODAY!

Like many investors, one of your key goals in accumulating wealth is to ensure that it is passed on as you wish. Whether you are saving for retirement or need specialized wealth management services - such as trustee services, separately managed accounts, or alternative investments - you will have access to the products you may need when you need them. Fidelity works closely with our firm to help identify the products and services that are in your best interest. Moving forward, Fidelity will continue to help find new ways for us to better serve you. This ongoing relationship, complemented by Fidelity's advanced wealth management platform, provides a solid foundation to help you achieve your financial objectives.

ABOUT US

Guided by our conservative, proactive business philosophy, we have withstood the test of time in an often complex financial world. It is this stability and commitment to our clients that has allowed us to enjoy our enviable reputation as a service oriented wealth boutique.

Scan the code to visit our website

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Our mission is to guide our clients through life's many transitions. Change creates stress, both emotionally and financially. Our goal is to guide our clients through a disciplined process to optimize positive outcomes.

We understand the challenges families face today, from managing debt to saving for college or retirement, these personal finance challenges can be overwhelming.

Our commitment is to develop a personalized strategy utilizing our extensive experience enhanced by cutting edge technology to help you achieve your goals. We believe in thinking "outside the box" and are not afraid to challenge conventional wisdom in our approach to investing and preserving wealth. Our work, commitment, and efforts are focused on you, your family, and your financial well-being

OUR SERVICES

WealthFXRetirement

WealthFXCollege

WealthFXEstate

WealthFXDivorce

WealthFXTransition

WealthFXElder

WealthFXCareer

WealthFXEducation

Let us tell you more about our different processes.

We are here to help you and your family through different life milestones.

Set up a consultation with us!