ECON WEALTH
MANAGEMENT

COMPREHENSIVE PLANNING

PREMIER PLAN

Econ Wealth offers a higher standard of wealth management - personalized strategies, proactive guidance, and unwavering attention designed to simplify your financial life and elevate your success.

Premier Level Planning Service

Legacy Planning

Extend your plan to the next generation, ensuring your loved ones are supported with guidance and clarity for the future.

Advanced Estate Planning

From trusts to charitable giving, liquidity planning to tax-efficient strategies, we help address the complexities of your estate plan.

Professional Collaboration

We work with your trusted professionals - attorneys, CPAs, and insurance advisors - to ensure your financial picture is in line.

Exclusive Access

Work with our executive planning team for expert guidance tailored to your specific goals and needs.

Customized Schedule

Create a personalized planning schedule designed to meet your goals, milestones, and priorities.

Relationship Perks

Exclusive opportunities to connect outside the office - whether over a round of golf, dinner, or drinks. You decide!

Premier Clients

Business Owners

Clients seeking tailored financial solutions to support growth, optimize operations, and manage both personal and business wealth.

Accredited Investors

Clients looking for access to exclusive investment opportunities, personalized strategies, and advanced portfolio management.

Non Profit Organizations

Mission driven organizations that require unique financial guidance to maximize impact, ensure compliance, and strengthen long-term sustainability.