



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.

Important Disclosures: Econ Wealth Management provides general investment education and recommendations. We do not guarantee any specific investment results. All investments involve risk, including the potential loss of principal. Not all investment strategies are suitable for all investors. Each client's portfolio is designed to align with their unique financial situation, objectives, liquidity needs, and risk tolerance. Econ Wealth Management is not engaged in the practice legal advice or tax preparation and no comments should be construed as legal or tax advice. Tax information provided is general in nature. Always consult a legal professional or tax professional regarding your specific tax situation.