

WE EMPOWER PEOPLE TO LIVE
COMFORTABLY BY PLANNING WISELY.



BUSH
WEALTH MANAGEMENT



OUR MISSION

Every person, family and business has a different set of priorities for what they want their money to accomplish. Whether it's to save for retirement, put children through college, or simply leave a long, lasting legacy; our focus are your individualized goals.

We are a not a one-size fits all wealth management firm. Our team pride themselves on creating personal, goal oriented, and comprehensive strategies. We strive to equip our clients with the knowledge and confidence to make the best decisions for their family.

**SINCERELY,
BUSH WEALTH MANAGEMENT**

“ IN LIFE, THE PERSONAL
RELATIONSHIPS FORGED BY
TRUST ARE MORE COVETED
THAN WEALTH ALONE;
WE VALUE THOSE
RELATIONSHIPS. ”

BUSH WEALTH MANAGEMENT

COMPREHENSIVE FINANCIAL PLANNING

Focusing on a select group of clients allows us to offer you well-rounded, in-depth service. You can rely on us for all your financial needs, entrusting us to create comprehensive investment strategies for your assets.

Our comprehensive financial services and strategies:

- Asset allocation
- Risk assessment
- Tax consequences
- Portfolio management
- Insurance planning
- Business succession
- Education planning
- Retirement projections
- Account management
- Defined contribution plans
- Rollover strategies
- Roth IRA conversions
- Estate Planning



