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About WeberMessick

Wealth Management: Based in Mid-Atlantic region, WeberMessick's team of CPAs and financial advisors have provided investment and tax services to clients throughout the country. We take pride in knowing that the personal assistance you receive comes from years of advanced training, technical experience, and financial acumen.

Financial Planning

Managing your finances and personal assets are about more than cold numbers. At WeberMessick you'll get personalized services to help work toward your financial goals.

Forward Thinking

By offering our clients both accounting and financial planning services, we are able to recommend a financial plan designed to help maximize assets while reducing taxes.

Creative Reasoning

We are creative problem solvers—helping you go from goal, to action, to resolution. We have the breadth and depth of experience to help guide you through any financial situation.

WEBERMESSICK
WEALTH MANAGEMENT

Working with WeberMessick

COMPREHENSIVE FINANCIAL PLANNING

GOAL SETTING
Clarify what is important in your financial life

ASSET ALLOCATION
Proper portfolio allocation and periodic rebalancing based on your individual risk profile

RISK MANAGEMENT
Insurance planning and solutions

RETIREMENT PLANNING
Proper distribution planning and evaluating the right time for retirement

SOCIAL SECURITY
Help you decide when to take social security for lifetime income maximization

TAX PLANNING
Minimize taxes through the myriad of financial decisions, including tax preparation

ESTATE PLANNING
Proper estate preservation and distribution according to your wants and needs

COMMUNICATION AND ACCOUNTABILITY

FOCUSED MEETUP
Standard meetings to update or review your financial life

ONGOING ACCESS
24/7 access to your financial information

FINANCIAL MODELS
Periodic update of your lifetime roadmap

REBALANCING
Periodic rebalancing based on market conditions, life changes, or risk tolerance

NEXT GENERATION DISCUSSION
Coordinate discussions about the proper time and tone of discussing your money with your family

MONITORING AND EVALUATION

OTHER ADVISORS
Work with other advisors, such as attorneys and bankers to minimize friction in accomplishing your goals

BUSINESS PLANNING
Assist with ways to transition business obligations and implement business succession plans.

REASSURANCE
Reminder of long term goals and historical perspective

OPPORTUNITIES
Sounding board for business opportunities

WeberMessick
Wealth Management

WeberMessick Onboarding Process

Evaluate Finances

- Discuss client goals and objectives.
- What are your assets?
- Do you have debt to pay off?

Establish Goals

- How can I pay for my children's education?
- Am I investing the right way?
- How and when do I want to retire?

Design A Plan

- Define your goals.
- Are you on a path to get there?
- Implement your strategy.

Implement Strategy

- If necessary, schedule an implementation meeting to complete outstanding paperwork and implement decisions from previous strategy meetings.

Monitor Results

- Meet regularly and monitor results.
- Review financial model.
- Make changes to strategy as needed.

Investing involves risk including loss or principal. Rebalancing a portfolio may cause investors to incur tax liabilities and/or transaction costs and does not assure a profit or protect against a loss. No strategy assures success or protects against loss.

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