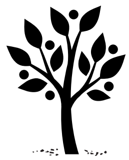
Return on Life

Clients have unique investment goals and objectives that change as they pass through each phase of their life. Feltz WealthPlan's mission is to provide a comprehensive customized financial plan and investment strategy to help guide our clients through the various challenges of each phase.



Wealth Accumulation & Growth Planning

Asset Management

Savings/Growth

Insurance Planning

Monte Carlo Stress Testing

Transitional Planning

Asset Protection

Income Planning

Legacy Planning

Asset Preservation

Income Needs

Estate Planning

Return on Investment

Based on each client's unique objectives and risk tolerance, we customize portfolio solutions with utilization of either risk-based or income-focused investment strategies, or a combination of both. Our risk-based portfolios focus on maximum tolerable loss, supported by our Riskalyze profiling process and portfolio stress testing. Our income-focused strategies focus on long-term income planning as well as current income needs as clients plan or transition to the distribution phase of their investment life.