Feltz Wealthplan

Our Consultive Process

We approach each new engagement with a consultive process. This allows us to have an open dialogue in which we learn about every client's values and goals while we work towards tailoring a plan to help them achieve those goals. Our team strives to develop innovative solutions to address each client's situation, focusing on 'Return of Life' as well as 'Return on Investment.' Our mission is to provide a comprehensive customized financial plan to help guide our clients through the challenges of each phase of their lives.

Full Client Experience

Discover Initial Meeting → **Propose** Wealth Plan Strategy → **On-Board** Welcome and Thank You → **Follow Up** Tech and Transfers Review → **Review** Regular Progress Meetings

Our Wealth Management Process

Investment Management

- Risk-Based Portfolios
- Individual Stock Strategies
- Income-focused Strategies

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Financial Planning

- Wealth enhancement including cash flow, tax planning and liability management
- Wealth Transfer
- Wealth Preservation
- Charitable Giving

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Relationship Management

- Regularly scheduled calls, reviews and in-person meetings
- Outside professionals, including legal, tax and insurance advisors

Don't wait. Let us help you get started.

We want you to benefit from a professional team that offers a clear vision of the wealth management process.

The O'Mara Team

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