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Private Wealth Manager

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Guardian of the Wealth of the Most Productive People on Earth.

Since 1994, Michael has helped investors accumulate, preserve, protect, and distribute wealth in the most tax efficient manner. His work includes comprehensive financial, investment, estate, and business succession planning. He uses his training, experience, and behavioral finance skills to educate, identify, solve problems and simplify financial discussions. His clients include successful retirees, pre-retirees, widows/widowers, business owners and professionals. They choose to work with Michael because of the creative ideas he brings to the table, because he coordinates with their other advisors (attorneys and CPAs,) because he acts as their catalyst to get things done and because he guides them along the way.

Mike has earned the CERTIFIED FINANCIAL PLANNER™ certification. His other credentials include a Bachelor's degree in Business Administration from the Ross School of Business at the University of Michigan and a Master's degree in Business Administration from the Mendoza College of Business at the University of Notre Dame. He holds various securities and insurance licenses.

Mike is a popular speaker/presenter/author/educator for various groups, trade associations and corporations. Active in the community, Mike serves or has served as a board member of the University of Michigan Alumni Assoc., the Notre Dame Alumni Assoc., the Sigma Alpha Epsilon Alumni Assoc., the Detroit Golf Club and Yatooma's Foundation for the Kids. He is an advisor to the Ocular Immunology and Uveitis Foundation and member of the Personal Financial Planning Task Force of the Michigan Association of CPAs. For years, he volunteered as a Little League baseball coach and as a walking scorer for the PGA Tour's Rocket Classic golf tournament. He's a bit of a car guy, enjoys watching professional comedians and his other interests include fitness, exercise and nutrition.

Mike has 3 children, Alexander, Raquel and Jenna and lives in Bloomfield Hills, MI.

Contact Michael at Michael.Acho@weeklymarketreview.com

For many years, Mike has published The Weekly Market Review, a popular weekly newsletter with timely, and sometimes timeless, information and commentary. To receive it via email, please send him your email address.

BACKGROUND

LICENSES AND REGISTRATIONS

Series 7, 66 Life
& Variable Contracts

SERVICES

FINANCIAL STRATEGIES TIMELINE

ACCUMULATION

Tax Strategies
Cash Flow Management
Trusts
Home Purchase Strategies
Education Funding Strategies
401(k)
Payroll Deduct IRA, Simple IRA
Life Insurance

PRE-RETIREMENT

Accumulation
Cash Flow Analysis
Portfolio Design
Pension Strategies
Mutual Funds, ETF's, Stocks,
Bonds Fixed/Index/Variable
Annuities
Charitable Giving Strategies
Estate Planning Strategies
IRA Consolidation/Rollover

IN RETIREMENT

Tax Strategies
Cash Flow Analysis
Portfolio Design
Long Term Care Insurance
Charitable Giving Strategies
Estate Conservation Strategies

BUSINESS SERVICES OFFERED BY WSFG

Qualified Retirement Plans
Financial Planning
Investment Advisory Services

Portfolio Design
Business Valuation Resources
Tax Minimization Strategies

Succession Strategies
Group Benefits
Buy/Sell Agreements Funding
Strategies

Securities offered through Cetera Advisor Networks LLC, member FINRA/SIPC. Advisory Services offered through Cetera Investment Advisers LLC, a registered investment adviser. Cetera is under separate ownership from any other named entity.

For a comprehensive review of your personal situation, always consult with a tax or legal advisor. Neither Cetera Advisor Networks LLC nor any of its representatives may give legal or tax advice.