Malek Wealth Advisors

Guidance

We guide clients on their financial journey in life. Planning their roadmap begins with understanding the "why" before mapping the "how." Everyone has a financial journey and the "why" makes yours unique. The "how" is a customized financial strategy aligned with your specific needs and values. Our holistic approach weaves investments, insurance, tax, and legacy planning into a clear and understandable plan.

Financial Clarity

You deserve to see a clear picture of all of your money in one place, organized and working together to achieve the lifestyle you want. Let's face it – the account values in most static financial plans become outdated within days. The market moves, life happens, and you need a plan that can keep up. We provide a dynamic financial plan that reflects up-to-date account values. We help organize your 401(k), IRA, bank accounts, stock portfolios, and credit cards all into one place. You can even collaborate with us online to ask questions. Let us show you how simple it is to have the financial clarity and contentment you deserve.

Caring

As the old adage goes, "You are judged by the company you keep." At Malek Wealth Advisors, we take these words to heart and are appreciative of the wonderful people who choose to work with us. We live by the golden rule to treat others as we would like to be treated – kindness, integrity, compassion, and happiness are characteristics we admire.

Independent

Malek Wealth Advisors has aligned with the independent broker-dealer Cambridge Investment Research, Inc. Our partnership with Cambridge means we are not employees of an investment or financial services firm and are not pressured by corporate interests. Instead, we are able to focus on what is best for you and your financial goals, creating customized financial plans specifically suited to your needs.

To learn more about us and the services we provide, please visit our website at www.malekwealthadvisors.com.

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"I have been told that I make investments and planning simple and understandable. I strive to make my clients feel confident in their decisions."
~ Bob Malek

About Bob Malek, CRPC®

For the past four decades, Bob has had the privilege of helping clients build wealth, protect wealth, and distribute wealth in the most tax-efficient manner possible. There have been many changes during that time, but his commitment to knowledge and excellence have remained consistent. He appreciates the trust and confidence his clients have placed in him.

Bob graduated from DePaul University with a Bachelor of Commerce degree. He continued his professional studies through the College for Financial Planning. He is a Chartered Retirement Planning Counselor℠, which further strengthens his understanding of clients' needs both before and during retirement. He holds various FINRA licenses, as well as state insurance licenses.

Bob takes joy in traveling and exploring all of the beauty we have been gifted. He enjoys visiting with family and friends around the country and exchanging travel experiences. His biggest pleasure comes from spending time with his four children and their growing families. He adores watching his grandchildren grow up! Golfing, baseball, and snorkeling are a couple of hobbies he relishes during his free time. He is also involved with several charitable organizations as well as the local chambers of commerce near his offices.