

MCCARY ANHEUSER WEALTH MANAGEMENT

McCary Anheuser Wealth Management, LLC helps clients nationwide avoid costly financial planning and investment management mistakes with their family's finances. Our team of experts deliver custom-fit CFO and CIO services at a reasonable fixed subscription cost. And as fee-only fiduciaries, we minimize conflicts of interest in how we're paid; only 1% of Advisors are paid in this superior way. Call us for a free consultation.

When you work with **McCary Anheuser Wealth Management**, you can expect:

No Product Sales

We don't sell any financial products nor do we receive any commissions. We are fiduciaries. Our complete focus is on what is best for you.

All-Inclusive Approach

Together we design an all-encompassing strategy that takes into account every aspect of your finances.

Unlimited Access

With your annual fee, you can meet or speak to us as often as is necessary to help you make important decisions and accomplish your financial goals.

Value for Your Money

We are committed to providing value that exceeds our fee.

OUR SERVICES



Goal Setting

Understanding what is important to you is essential when structuring your finances. We work through exercises with you to identify and create plans to achieve your goals.

Coordinated Investment Advice

We will provide you with objective, unbiased investment recommendations based on your personal needs so that you can make the best investment decisions.

Skillful Tax Planning

Taxes are at the core of financial planning. We review all potential tax consequences that can impact your financial security throughout the year.

Worry-Free Retirement Planning

Retirement is about money; but it's more about personal fulfillment and enjoyment. We will help you create a plan to make the most of your retirement years.



Risk Management – Are You Over/Under Insured

Insurance. There are multiple options for any type of situation and the task of deciding what to choose can be daunting. We will discuss these issues in detail and help you spend your insurance dollars wisely.

Lifestyle Spending Review

We'll help you understand the difference between good and bad debt, make sure you have enough set aside for emergencies and special opportunities, and, if needed, help you gain control over your spending.

Proactive Estate Planning

Estate planning goes well beyond making a will. We will evaluate with you the pertinent estate issues that impact your life and consider choices that you can then implement with your attorney.

Open-Door Policy

Financial planning is a process, not an event, and we are here for you when you need us. Our open-retainer approach accommodates regular ongoing reviews of key financial areas, with access, or an open-door, to the advisor when needed.