Your Personal CFO

- Written financial plan
- Two Formal meetings per year
- Complete financial assessment
- Prioritize and set financial goals
- Assistance with CPAs & Attorneys
- Referrals to CPAs & Attorneys
- Cash flow, debt, & budgeting

Investment Management

- Regular Investment Reviews
- Consolidate and simplify accounts
- Review existing 401k and IRAs
- EMoney. Our web based financial management tool

Wealth Management

- Retirement Income Planning
- Estate and charitable planning
- Long term care planning
- Maximizing Social Security
- Insurance Planning
- College Planning

Helping You and Your Family

- Multi-generational planning
- Insurance Audit Review
- Trust services
- Client Educational events and seminars
- Mappa Wealth Management – Family Office Practice

Safeguarding & Due Diligence

- Regulated by both SEC & FINRA
- 3rd party compliance & oversight
- 3rd party investment managers
- 3rd party investment custodians
- Ongoing manager due diligence
- Insurance company due diligence
- Disaster protection plan in place
- Impartial investment research