uswealthmanagement.com
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US WEALTH MANAGEMENT

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US WEALTH MANAGEMENT

Tailoring Strategies to Manage Your Financial Future

Our Promise to You

U.S. Wealth Management develops **tailored strategies to manage your financial future**. Our robust national network of advisors spans the country from New England to California and brings together a common focus — a personal interest in meeting all your investment, insurance, and retirement needs as they change throughout your lifetime.

Backed by the full resources of an established wealth management firm, U.S. Wealth Management, our decisions are not made alone, but with a knowledgeable team of professionals possessing a reputation of success.

Our Commitment — Clients First

- You can be confident that we have your well-being at heart and will always take a personal interest in helping to address what is important to you.
- We will always listen, are available to talk, and are passionate about your goals. We will take the time to ask the right questions to recognize your needs.
- You will be delighted by the friendliness and enthusiasm of our team.

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Your Financial Plan — Always There. Always Clear.

Guiding you through your financial decisions and creating a holistic plan involves:

1. Taking the time to get to know you and identifying your personal needs and objectives. This starts with reviewing and organizing all aspects of your financial world — not only the known, but the unknown. We coordinate the services of all your trusted professionals to manage your financial situation, minimizing the possibility of something falling through the cracks.
2. Accessing an expansive range of products and resources to ensure we are making the appropriate recommendations based on your needs. By knowing you, we are able to tailor strategies that are personalized for you. You will be confident in the advice given and the decisions you make.
3. Providing a true roadmap with clear milestones so you know where you are on your path to financial well-being. You will have real clarity as it relates to your financial future, as well as a clear understanding of your options.
4. Keeping you informed of investment opportunities while mitigating risk, providing you with one less thing to worry about.

You'll have confidence in knowing that your money is working to support your goals through all the stages of your life.

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Elevated Service

When asked what makes us distinct, our clients tell us it is our availability and accessibility. Whether during a regular face-to-face review of your portfolio, monthly briefings, or directly responding to your queries, you'll be up to date, informed and educated. Serving you and listening to your needs is our pleasure. When you call, we answer!

In addition, we will:

- Contact you regularly, while accommodating your schedule because we know your time is valuable.
- Avoid industry jargon and speak in a language that is common to all of us, so that you are comfortable discussing any topic and asking any questions.
- Be proactive and not reactive in all communication with you — leaving you with the security of knowing that we are always available.

Trust in a Lasting Relationship

Our foundation is created by fostering a long-term and meaningful relationship with you for life. You can be confident that you truly have a friend here at U.S. Wealth Management and trust you have a real partner in helping to manage your financial future.

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For more information, please visit: uswealthmanagment.com.