

Wealth management services



**Wealth
Management**

PLLW Wealth Management Group

PLLW Wealth Management Group is a financial advisory team, located in Florham Park, New Jersey, providing quality client service and a broad spectrum of wealth management services. Our primary focus is advising and servicing individuals, families and small business owners to help them address their investment goals. Our deep commitment to clients is defined by three core principles:

Experienced team of professionals — advice that builds trust and supports your long-term financial objectives

- Years of experience and the benefit of a multi-dimensional team helps us develop a complete understanding of our clients, their families, and their priorities.
- Our knowledgeable team is accomplished at problem solving and identifying 401 (k) opportunities and, in a transparent way, focused on fiduciary care standards.
- We foster meaningful conversations that help provide an understanding of where a client is today and what life priorities are important to them.

A defined process — clarity and understanding of your financial life and a disciplined process to help grow and manage your wealth

- Our consistent process helps us understand what is truly important to our clients and the vision of their family's financial legacy.
- Our team prides itself on a defined process which addresses client expectations, manages risk and shows tangible progress.
- We develop customized, comprehensive, goals-based strategies with each client, and then implement and monitor the plan to ensure goals are met.

Dedicated service standards — knowing your committed and caring team is serving your family's financial needs and goals as they evolve

- Our focus is solving clients' problems and providing education which helps clients navigate the complex financial landscape.
- We provide access to extensive research, objective guidance, financial stability — and the vast resources of RBC, a global leader in wealth management.
- Our guiding principle of the client always coming first is manifested through proactive superior service and consistent communications.

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RBC Wealth Management does not provide tax or legal advice. We will work with your independent tax/legal advisor to help create a plan tailored to your specific needs.

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