Helping to Grow More than Wealth

The **Poulin Wealth Management Group** helps clients make thoughtful decisions beyond the scope of just their financial portfolios.

True comprehensive wealth management is important to Paul Poulin. He's seen so many people make financial decisions that may have been important or appropriate years ago but that have not remained the right plans as people got closer to retirement, a time when income planning and legacy become critical.

Poulin, first vice president of Poulin Wealth Management Group (PWMG), RICP®, and a Certified Financial Planner™, explains PWMG's No. 1 goal is to help clients ensure they have enough money to last a lifetime.

"I don't want clients to worry about competing with the market," Poulin says. "I want them to have peace of mind. So, in addition to financial planning and wealth management, we provide services and advice concerning legacy planning, health care, long-term care, and more."

Client Service

In addition to the accumulation and protection of wealth and its transfer, PWMG focuses on serving women in transition, whether navigating a divorce, the death of a partner, retirement, or other life event. Poulin considers sharing advice above and beyond matters concerning financial portfolios to be a differentiator.

"We are a resource, a sounding board for our clients," notes Poulin. "We are happy to spend extra time with the soon-to-be-retired client, and we'll help a client with how to be a financial resource for a child or family member without destroying their own financial future.

"Clients shouldn't feel awkward about asking for such advice or feel the need to apologize for asking," Poulin assures. "This is not only a part of our job—it's our passion and part of what it means to provide comprehensive wealth management."

Senior client associate Jane-Ellen Symmes adds that the group works only with a limited number of clients. Doing so, she suggests, has allowed the team to build stronger, more personal relationships with clients. "We know our clients, we know their families, and we understand their circumstances," she says. "At PWMG, each client is a person, not a number."

Second Opinion Service

The team also offers a second opinion service. It's a service that involves deep discovery and a thorough review of a person's goals, worries, and passions.

"We understand each person's financial situation is unique. Our second opinion service, based on what is discovered, could result in a continued relationship," says Glenn Simon Zavorskas, financial advisor with PWMG. "Maybe they are on track financially, maybe we can help them avoid a potentially costly mistake, or maybe we do have something special we can offer them. Our goal is that everyone is well prepared for the future."

RBC® Wealth Management

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