

Crowe Wealth

Crowe Wealth Management, LLC

“We explore and inspire to build family wealth.”

At Crowe Wealth Management, we can help you navigate the way through your wealth-building journey. Our mission and process combines understanding your values, encouraging action and designing success. Through our combined efforts, we build wealth, realize dreams and extend legacies.

Service Overview

Our family office services will help you and your family establish the building blocks of wealth. You deserve an advocate and a dedicated resource to help align your wealth with your family mission.

As fee-only professionals, you can count on us to work for your best interests. Our only agenda is your agenda. We offer a unique and independent focus in building strategies just for you.

Principal Services

- ◆ Personal Financial Planning
- ◆ Family Strategic Planning
- ◆ Fiduciary Services
- ◆ Personal Services

How you Benefit

- ◆ Comprehensive Services – your family gains a CFO for your family wealth
- ◆ Family Advocate – solutions are developed that promote your family’s mission
- ◆ Collaborative Approach – Integrated plans mutually developed by you, your other advisors and Crowe Wealth Management
- ◆ Personalized Service – order is achieved out of complexity
- ◆ Unified Strategy – generated from a continuous process and focused on the long-term
- ◆ Resource Sharing – family members benefit as a whole instead of just individually
- ◆ Back to Basics – you and your family gain more time for quality of life
- ◆ Generated Resource – family members can better understand the responsibilities of family wealth

Your family is like no other. Crowe Wealth Management is like no other wealth-building partner. Our independent, fee-only approach to delivering family office services can help your family maximize long-term wealth and reach your collective dreams.

For more Information, please call us at 1-888-276-9396.