Plante Moran Financial Advisors

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Is Your Wealth Management Plan Working for You?

In today's financial environment, there's only one certainty. And that's uncertainty. Which is reason enough to step back and look at your wealth management plan, see things from all angles, and make sure it can adapt to whatever the future throws at you.

To help you with this, the financial management professionals at Plante Moran Financial Advisors (PMFA) would like to share five important considerations for helping you get the most from your wealth management plan.

Ask yourself the following questions. Is your plan:

1) Definitive, clearly defined with provisions to cover all circumstances, including extreme highs and lows?
2) Coordinated with your goals and values, and customized to fit your individual needs?
3) Disciplined, so that a plan is followed, monitored, and addressed against your goals?
4) Transparent, allowing you and your advisor to be able to see all aspects of your various accounts, including total fees? That way, you'll be able to tell which ones are performing, which ones aren't, and why.
5) Comprehensive, integrating all of your financial goals, to help achieve them in a way that is seamlessly holistic?

Uniquely Equipped to Make a Difference for You

With over $5 billion of assets under management, PMFA is an independent, comprehensive wealth management firm, and an affiliate of Plante & Moran, PLLC, the nation's 12th largest accounting and business advisory firm. As you might expect from a company with that kind of pedigree, client service is in its DNA.

Along with this high degree of client service comes a low degree of self-interest. By the inherent makeup of the organization, the advisors work for you, not themselves. "Our staff members receive no special compensation based on the number or size of the accounts they handle. Rather, everyone works together for the good of the client," says Bob Palmer, president. "And what's good for the client is good for the firm."

PMFA offers a comprehensive array of services along with an exceptional depth of resources. This makes it uniquely equipped to assist clients no matter what their situation.

Motivated to work in your best interest, qualified by unparalleled expertise, and equipped with the most advanced resources — no other firm can offer quite what PMFA can. It's no wonder that in turbulent times like these, choosing the right advisor might be the most important financial decision you can make.

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