Why Choose a Certified Wealth Strategist®?

CWS Certified Wealth Strategist®

Every Wealth Strategist:

- Understands and uncovers the key wealth issues high net-worth clients face
- Understands their clients' situation, future, feelings, and family dynamics - the big picture of where they need to be - and helps to reconcile any gaps
- Places these issues in the context of a wealth management strategy
- Forms reasonable and logical opinions for addressing each set of issues and for bringing in appropriate resources
- Acts as an emotional counselor, relying on a disciplined process to achieve client goals

A Certified Wealth Strategist®:

- Has the knowledge and skill sets needed to work with more complex client issues and better serve the high-net worth market
- Is well versed in the finite number of key issues that must be addressed with all affluent and high-net worth clients
- Has the competence to identify issues and assume the lead role in analysis with other experts as needed
- Provides ideas, suggestions, and alternatives for addressing your specific issues
- Is your "Trusted Advisor"

A Certified Wealth Strategist® strives to help clients:

- Create and grow wealth
- Protect and preserve their wealth
- Plan for the distribution of their wealth during life in the most tax-advantaged way
- Plan for the distribution of their wealth at death in the most tax-advantaged way