



WEALTH ADVOCACY



Leading Your Business to Excellence

At Wealth Advocacy our specialized team of professionals help you implement sound and efficient financial and management strategies. We review such areas as cash flow, financial oversight, leadership practices, enterprise value, and risk management.

An integrated strategic plan is best achieved by considering all facets of your financial picture. Our mission is to create an optimal plan that meets your goals.

We are independent fiduciaries, with a clear hourly or per project pay structure. Our incentive is therefore based solely on your agenda, with no hidden commissions or fees.

We will work with other key players such as your accountant, attorney, insurance agent, benefits provider, and anyone else that can help achieve the best result.

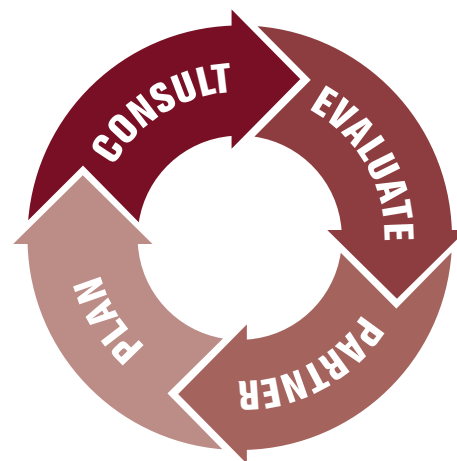


Our Services

- Income and Cash Flow Analysis
- Risk Analysis and Mitigation
- Benefits and Investment Analysis
- Real Estate and Closely Held Asset Review
- Succession and Legacy Planning
- Strategic Business Analysis
- Asset Review and Protection
- Ongoing Monitoring & Consultation



As Your Advocates



Our Experienced Partners

Our team has over **100 years** in Financial, Legal, Business and Investment Management experience at your disposal. We are an independent group of consultants, with allegiance only to you, and we will focus only on your specific needs to find personalized, creative solutions. We are here to help you, your family, and your business thrive and succeed.



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Human Resources | Wealth Management
Risk Mitigation | Business Consultancy
Certified Trust and Financial Advisor



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Legal Matters | Small Business Planning | Consumer Protection
Credit Analysis | Identity & Reputation Management



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Business Management | Financial Analysis
Capital Structure & Budgeting | Mortgage Lending
Sales Analysis & Management



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Commercial Banking & Lending | Entrepreneurship
Commercial Real Estate | Strategic Planning | Marketing

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