Milestone
Private Wealth Management, LLC

Your Advisor for Life.

Milestone Private Wealth Management provides ongoing investment information and financial advice to both business and individual clients.

Our firm offers a unique client experience in the form of a simplified, efficient, streamlined journey. We take pride in guiding our clients along the path to reaching their individual milestones.

Our ultimate goal is to create clients for life.

Milestone continuously seeks to find the most appropriate—and simple to understand—investments for both our business and individual clients. Through our investment strategies, we can help clients achieve their goals.

Business Clients

Many of our clients are business owners who want to offer their employees a retirement plan that helps them reach their "milestones". We take the burden off their shoulders by assisting with the development, implementation and monitoring of a plan that fulfills their fiduciary responsibilities and helps their employees reach those goals.

We excel in providing comprehensive education to our clients' employees. Our team's goal is to explain and present potentially difficult concepts in a more simplistic and understandable format.

Individual Clients

Milestone's clients are always on the go; they want and actively seek our advice. We have genuine concern for our clients' well-being. They know from experience that we will go above and beyond for them, which helps our clients and their families choose to stay with us for generations.

Ken D. Bolton, President
Milestone Private Wealth Management, LLC

Contact us today to discuss how we can help you reach your own milestones.

Phone: (805) 647-8889
Fax: (805) 293-9190
kbolton@milestonepwm.com