Wilson Advisors, LLC

Personal. Objective. Professional.

Financial Counseling

Wilson Advisors, LLC provides a wide variety of financial counseling services, focusing primarily on senior corporate executives and other high net worth individuals. Our commitment to our clients is based on a complete and intimate understanding of your objectives, values and ideas about the risk and reward involved in each aspect of your planning.

We work directly with each client on a very personal level, establishing both individual and family goals, incorporating strategies designed to protect and grow client assets through objective, fee-based wealth management and sophisticated tax and estate planning techniques. It is our mission to become your most integral, trusted, professional advisor, focusing on a broad array of financial planning topics, including:

- Providing in-depth advice and comprehensive recommendations on all financial, tax and legal matters, including estate planning, income and estate taxes, charitable giving, cash flow and retirement planning, education funding, company benefits and insurance coverage.
- Counseling on asset allocation, diversification and investment selection.
- Evaluating current and target portfolios, factoring in risk tolerance, cash flow needs, appropriate time horizons and tax efficiency, and reallocating as necessary.
- Anticipating and incorporating evolving circumstances into all of your planning.
- Recommending, directing and managing all external investment, insurance, legal and tax professionals.
- Assisting with the implementation of all decisions and completion of all necessary paperwork.

Timothy J. Wilson, Owner & Principal

I have 25 years of experience as an independent advisor, counseling clients and their families on all matters related to their personal financial planning needs. I founded Wilson Advisors, LLC in May 2007 after a career as Senior Vice President of MullinTBG Advisors and as a former partner and financial advisor for The Ayco Company, L.P., which is now a Goldman Sachs company. My responsibilities have included marketing and counseling hundreds of individual clients, along with establishing and maintaining corporate liaison relationships.

My designations and licenses include admission to the New York State Bar and NASD Series 65. Wilson Advisors, LLC is a Registered Investment Adviser licensed through New York State and the State of California, representing clients throughout the United States.

I received a Bachelor of Science Degree in Accounting in 1989 from LeMoyne College in Syracuse, NY and a Juris Doctorate Degree from Albany Law School of Union University in Albany, NY in 1992.

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