



Wealth
Management
CONSULTING

Helping CEOs connect the dots.

Leading an organization is a complex, multifaceted endeavor. It requires strategic vision, effective team leadership, and a clear path toward a lasting legacy.

Wealth Management Consulting (WMC) specializes in helping Advisors and CEOs navigate these complexities to achieve their highest aspirations.



Carolyn Armitage, CFP®, CIMA®
Founder & CEO

CUSTOMIZED APPROACH • EXPERT GUIDANCE • IMPACTFUL SOLUTIONS

Through a combination of insightful guidance, practical strategies, and a tailored plan, CEOs can achieve full potential, drive sustainable growth, and increase firm value.



Enhance Enterprise Value

WMC works with CEOs to identify and unlock opportunities to maximize enterprise value. From optimizing operational efficiency to implementing strategic initiatives, WMC provides guidance to elevate organizations to new heights.



Lead High-Performing Teams

Building and leading a high-performing team is essential for success. WMC offers expertise in talent development, team dynamics, and leadership strategies to help CEOs design a culture of excellence and drive performance across the organization.



Design the Dream Legacy

A legacy represents more than just professional accomplishments; it reflects your values, vision, and impact.

WMC collaborates with CEOs to design a legacy that aligns with their aspirations and leaves a lasting imprint on clients, employees, and the industry.

How can WMC help CEOs?

- ✓ Strategic & Succession Planning
- ✓ Compensation & Equity Sharing Plans
- ✓ Valuation
- ✓ M&A Guidance: Prep, Buy, Merge, Sell

Moving firms forward, together.

With decades of industry experience, WMC has deep empathy for the challenges and opportunities facing Advisors and CEOs.

Collaboratively, WMC will identify and play to their strengths, overcome limiting beliefs, and develop clarity in priorities to achieve objectives.

WMC's mission is to help leaders connect the dots and drive real, measurable outcomes to build the firm of their dreams.



Schedule a virtual cup of coffee with Carolyn
to take the first step toward a **brighter future.**

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