Millennium Wealth Management Partners

Helping you pursue your vision for a bright financial future

Millennium Wealth Management Partners

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Millennium Wealth Management Partners provide a financial process for you, your family and your business. Through a disciplined approach to wealth management, our team develops and implements customized strategies for clients with the objective of growing and preserving their wealth over multiple generations. What this means to you is gaining tailored solutions based on your needs and objectives. The real benefit is being able to clearly see how our process helps you pursue your financial goals.

Your vision is the core of our strategy. We work to discover what you value most—both now and for the future—and offer wealth management strategies and investment management services to align your assets with those values. By delivering comprehensive solutions and personalized service, we help our clients gain confidence in their financial future.

Understanding you
Our first priority is to talk with you about your financial goals and truly understand what is important to you. We conduct a thorough discovery to gain an understanding of your assets, liabilities and future goals, then work with you to develop a personalized financial plan. This allows us to understand and share your goals. Our collaborative, education-based approach ensures that you have the knowledge, resources and support necessary to feel secure in your financial decisions.

We provide timely guidance for whatever financial challenges you face and our ongoing dialogue ensures that we reevaluate your strategy as market conditions or your objectives change. By leveraging the powerful resources of UBS, we deliver professional services and solutions to you in a highly customized manner.

- Personal financial planning
- Portfolio and risk management
- Retirement income planning
- Access to alternative investments
- Personalized and collateralized lending financing
- Insurance planning
- Education funding strategies
- Wealth transfer planning
- 401(k), 403(b) and profit-sharing plan advice
- Cash management solutions
- Consulting for foundations and charities

Customized portfolio management to help preserve and grow your wealth
One of our key strengths is understanding your values as an investor. That insight allows us to offer a portfolio management process that is customized to you. This means that you will better understand the markets and how your portfolio is designed. We manage our portfolios with prudent oversight from our team and expert research from UBS and other institutions. Our portfolio models are customized to meet a variety of investment styles and objectives.

Where our vision meets yours: the Millennium Wealth Management Partners process
Our process affords the flexibility and personal attention to help you grow your wealth on your terms.

Step 1

Discovery
First we'll learn about you, your vision and any special concerns or challenges you may be facing. We help you understand opportunities and strategies that are unique to you. You will be able to learn about our team and ask questions about our services and process.

Step 2

Review and confirmation
During this stage, we'll discuss your risk tolerance and gather data, documents and statements that will help in our analyses and recommendations.

Step 3

Wealth management planning
To make the most of your finances, we will work with you and your other professional advisors to develop a plan that aligns all your assets with your short- and long-term objectives.

Step 4

Investment planning
When planning your investment strategy, we'll review your financial goals and determine which strategy may be most appropriate for you. We're transparent about the details and fees associated with our recommendations, so you can be fully comfortable with your personalized investment allocation plan prior to implementation.

Step 5

Implementation
After we've had the opportunity to thoroughly review and discuss all recommendations, we'll work to implement your agreed-upon strategies. We'll facilitate the transfer of existing assets and the processing of all necessary documentation. We will then confirm when the setup of your strategy is complete.

Step 6

Follow-up meeting
During this in-person meeting, which will occur shortly after we fully implement your wealth management and investment strategies, we'll discuss your initial statements, the online resources available through UBS and a mutually agreeable schedule for future progress reports.

Step 7

Monitoring progress
Initial planning and implementation are just the beginning of our relationship. You can take comfort in knowing that we will continually monitor your investments and recommend adjustments when warranted. We'll also hold periodic performance and investment reviews to ensure that your investment strategy and wealth management plan reflect your current needs and objectives. We help you stay on track through life transitions so that you feel prepared and educated for any decision you may face.

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