Focused Wealth Management

REGISTERED | INVESTMENT | ADVISOR

THE POWER OF
A FIRM COMMITMENT™

Investor Client Benefits

Focused Wealth Management

Investor Client Financial Services

ACTION. The time is now to seek long-term investment advice.

We provide members of our Investor Class with:

- Annual portfolio review
- Frequent phone and email communication
- Online access
- Monthly and quarterly newsletters
- Comprehensive financial product offerings
- Next Phase Income Distribution planning*
- Financial planning available at additional cost*

*These services are available with a financial services agreement.

Investor Client Benefits

216 Route 299, Highland, New York | main 845.691.4035 | tollfree 888.691.4035 | fax 845.691.4037 | www.focusedwealthmgmt.com