V/O:
Is your financial future a series of questions, without answers in sight? In these volatile economic times, it is more important than ever to have a partner by your side, helping you not only plan for, but shape, your financial future.

WealthTrust-Arizona is an independent, fee-based wealth management firm which specializes in the integration of investment management and estate planning.

We are one of the Top Ten, Independent, fee-based Registered Investment Advisor firms in Arizona, based on assets under management.

Let WealthTrust-Arizona be your partner on the path to financial well-being.

HOLLY DEEM:
At WealthTrust-Arizona, we use a team-based approach to help our clients work toward meeting their financial goals. We work closely with you to evaluate the health of your finances, outlining a step-by-step strategy to define those goals, and developing a realistic plan which will help you work toward meeting those goals.

We are proud of the close relationships we build with our clients – we form true partnerships with them, always keeping their best interests in mind.

PAUL AHERN:
We begin each relationship by creating a written financial plan that helps us educate our clients on where they currently stand, and where they are headed if they continue down the same path. Based on this information, we are able to create a customized portfolio that outlines exactly what we can do to help manage their money.

You wouldn't build a house without a blueprint – Why should your financial plan be any different? At WealthTrust-Arizona we will not manage money unless it is pursuant to a written financial plan.

V/O:
Once you become a Wealth-Trust Arizona client, we will provide you with a written financial plan covering all aspects of your present and future financial life. We will then conduct an inventory of your present assets and make a comparison of risks and historical returns, before conducting a probability analysis of your portfolio, and recommending changes to your portfolio.

We will then manage your assets in accordance with that written plan, making sure you review, understand and approve everything in the plan.

HOLLY DEEM:
We believe the best way to do business is to keep an open dialogue with our clients. We communicate on a regular basis, sending out quarterly reports and newsletters, and hold educational workshops with some of our most trusted financial names, discussing topics of relevance to your financial health.

V/O:
Our financial advisors will work with your CPA, attorneys and other trusted professionals to help you make intelligent choices which further align with your financial and personal goals.

PAUL AHERN:
Here at WealthTrust-Arizona, we are highly client-focused. Our number one priority is to make sure you prosper and achieve your goals.

We always conduct business in a way which is consistent with our core values of integrity, honesty and transparency, while helping our clients achieve their financial goals.

It all comes down to one thing – if it's not in the best interests of you and your portfolio, we won't do it.

V/O:
The highly credentialed team of professionals at WealthTrust-Arizona make one commitment, above all, to our clients: to help them achieve maximum wealth, at minimum risk, by carefully integrating the management of your portfolio with the management of your estate.

To schedule a complimentary first-time appointment to see how we can help you achieve your financial goals, call (480) 483-7300 or e-mail us at info@wealthtrust-arizona.com.