Rochester Wealth Strategies

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Rochester Wealth Strategies… A Strategy to Serve Always Succeeds

The team at Rochester Wealth Strategies has a simple solution to the seemingly complex scope of getting you to and through retirement. It is, quite frankly, sincerity backed by industry expertise. With over 80 years of combined experience, they have created a solid foundation of knowledge that has earned them the trust of both the financial community and our own community.

This strategy to serve with sincerity is why they choose to be a Fee-Only Fiduciary, which means they are legally bound to act in the best interest of the client, and they can never receive a commission of any kind. Within the industry, these characteristics can be viewed as the gold standard and the key to unbiased advice. More importantly, it gives their clients peace of mind knowing that they are receiving the best possible guidance.

Rochester Wealth Strategies has cultivated a comprehensive team that can navigate all aspects of retirement planning. When you work with them, you truly have all minds working together to help align your future. In contrast to many firms where each advisor maintains close to 500 relationships, their primary goal is to provide a superior commitment to the clients they work with. As a result, their unique approach enables them to maintain a 1:50 ratio of advisors to clients; supporting their ability to give clients the attention they deserve.

Through educational events, local advocacy, and community involvement, a seemingly small company has started to become a household name. It's easy to see their passion towards helping our city thrive through their support of the Rochester Regional Chamber of Commerce and the Downtown Development Authority. Their team also volunteers at Leader Dogs for the Blind, the Older Persons' Commission, and local ministries. In addition, they are part of an organization called Navigate Home, which is a group of trusted professionals that guide senior citizens through the challenges of aging.

Rochester Wealth Strategies offers diverse services in the categories of financial planning and investment management, along with advice on all the challenges that fall under those umbrellas, such as tax and estate planning. This includes people who may need to re-evaluate their retirement plan or those who are just looking for simplicity and to know that there is someone there to count on through every stage of life. They also take things a step further by helping the families of their clients, whether it be a parent experiencing dementia or a recent college grad looking to get started on the right financial path. Their conservative approach focuses on low-cost investing and transparency. Through years of refinement, they have developed a process that puts together all pieces of the financial puzzle.

This foundation of culture and sincerity is what will serve them well as they continue to be recognized as Rochester's hometown advisor. Please visit their office located downtown on the corner of Main and University as you will appreciate the warm and inviting family atmosphere. For more information, visit www.RochesterWealthStrategies.com or give them a call at 248-434-6550.

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