Emerald Connect | Updated Prentis Video 2019-720

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Prentis Wealth Management Group is a boutique firm within a much larger entity, Wells Fargo Advisors. We have the full resources and capabilities of a huge organization, but we provide personal wealth management within our group.

While the main day-to-day focus of our work is managing money, we believe strongly that everyone should have a plan. We start off by getting our clients organized. We simplify and consolidate their assets where possible.

And the first thing we ask for, is to see everything. Show us all your financial statements, because how do we know how to get you to point B, if we don't know exactly where you are today. And for the first time, a lot of them are seeing, wow, I'm worth this much money?

And then discuss with them where do they want to get to? When do they want to retire? What is important to them? What are their priorities?

We then enter all of their information into our proprietary retirement planning software called Envision. And what Envision allows us to do, is to stress test those goals. Envision also helps us to develop an appropriate asset allocation for our clients.

We bring in clients' estate attorneys when necessary. We bring in their accountants. Because when we have all the advisors rowing in the same direction, it really makes our process much more efficient.

And people need help. We're in a world of 1-800 help lines and automated online help.

Service is extremely important to us. When that phone rings, it's going to be picked up. We do that.

Personal finance can actually be quite daunting. There are so many nuances to the different areas, that even professionals in the industry don't fully understand. On top of that, regulations and details of each area are always changing. Peter and I recognized that very early on in our careers, and decided to pursue higher financial education through the certified financial planner designation.

I've been a financial advisor since 1981. And I taught fundamentals of investing for 10 years. And part of being a financial advisor is being an educator. Helping people to understand both the potential risks, as well as the potential rewards of the investment moves that they make.

While clients have access to all of the vast resources of Wells Fargo Advisors, we provide advice that is highly personalized. We are personally accessible and fully accountable to all of our clients. We are the Prentis Wealth Management Group.

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