

At the Prentis Wealth Management Group, we believe in a disciplined and sophisticated approach to managing your money. One built on strategy, not speculation. We are investors, not day traders. Our philosophy is rooted in discipline, common sense, and time-tested principles, not market timing or leverage.

We focus on total return, balancing growth and income, while always keeping your long-term goals in sight. Every portfolio we build follows a clear framework. It emphasizes tax efficiency and diversification.

We don't believe in a one size fits all solution. Customization is at the heart of what we do. We work within your risk tolerance, your timeline, and your values, crafting allocations that reflect your unique financial picture.

Diversification is key. We go beyond large cap growth to include value, mid cap and small cap, international and emerging markets, bonds, commodities, and alternatives. Our goal is to be opportunistic and build portfolios that are resilient throughout market cycles.

At Wells Fargo Advisors, we have an open architecture platform. That means we're not limited to investing with one set of proprietary products. We benefit from having access to research, insights, and strategies from many of the other leading investment firms across the industry.

Tax efficiency and costs matter. Whether we're building a new portfolio or we're working an existing one, we tailor strategies to be cost effective and aligned with your goals. Our objective is simple, to achieve the best net after tax total return on your investments.

A distinguishing feature of our team is that we are fiduciaries and portfolio managers. We manage portfolios on discretion with a personalized strategy. This empowers us to be both opportunistic and disciplined on behalf of our clients.

Backed by multiple decades of experience, we've guided clients through bull and bear markets with clarity and confidence. We are here for you and committed to your financial success.