Prentis Wealth Management Group of Wells Fargo Advisors

Investment and Insurance Products: NOT FDIC Insured/ No Bank Guarantee/ MAY Lose Value

At the Prentis Wealth Management Group, we are a multi-generational team. Different ages, different experiences, all working together. That means we are built to last and here to support and advise your family for generations to come. The exceptional is our standard.

We are a boutique firm within one of the world's leading financial institutions. With Wells Fargo's resources behind us, we combine the focus and cohesion of a tightly knit team with the reach and capabilities of a global firm.

Our clients expect comprehensive advice, and that means more than just investments. It includes lending, retirement planning, wealth transfer strategies, access to private markets, insurance, all delivered with care and thoughtfulness.

Our practice is founded on the pillars of discretion, respect, privacy, and above all, integrity. As fiduciaries, we strive to provide advice that is always personal, objective, and most importantly, with your best interest at heart.

When you entrust us with your life savings, we take that responsibility incredibly seriously. Wealth management should be personal. You have earned the right to be extremely selective about who you trust.

Our team strives to provide exceptional financial guidance   and concierge-level services to the individuals, families, businesses who have partnered with us.

We are here for you.

We serve a very diverse range of clients, from those with emerging wealth, to multi-generational families navigating more complex legacies. We also have clients in offices all across the country.

We start with planning. We help clients get organized, define their goals, and set a clear path forward. Our goal is to extend your lifestyle by decades, while enabling generous gifting to the people and organizations you love.

We want to know what matters most to you, whether that's a better lifestyle, reducing estate taxes, philanthropy, or creating a family legacy.

We leverage our planning software to refine and achieve your goals. When contemplating major financial decisions, we're able to model "what if" scenarios. What if we got more conservative? What if we want to help our children buy a home? What if I buy or sell a business?

We collaborate with your trusted advisors, including accountants and attorneys. Our experience is that the best outcomes come from a coordinated approach.

As with any relationship, communication is essential. We reach out to you regularly to check in and offer perspective. We also want to hear from you. Whenever you have concerns, life changes, or simply want to talk.

I've been a financial advisor since 1981. Since then, we have led clients through expansions ... recessions ... ... bull, and bear markets ... We've seen the 10-year treasury at 15% and half a percent. One of my favorite sayings is ... "Now is always the hardest time to invest." Investing, as we all know, is only easy in hindsight. Our experience has taught us that having a discipline and a process and a solid plan allows clients to view market disruptions as opportunities.

We recognize that everyone's wired differently. Each of us has a unique attitude towards risk. We design portfolios to reflect a required balance of growth, income, and stability. So when markets show their volatility, we can stay opportunistic on your behalf.

We love our work. It's about seeing plans come to fruition, impacting your life, and shaping your legacy. We're here for you and your family.

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