Let MWE Wealth Solutions help you fulfill your dreams and goals. Contact us to discuss your unique life or business challenges. Our customized services make it simple and our coaching is available whenever you have a question.

mwe wealth solutions LLC

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your dreams. your goals.

mwe wealth solutions LLC

Money is a powerful tool in the right hands. You've worked hard all your life. The rewards are personal as well as financial. So what's next?

We can help

Choose MWE Wealth Solutions LLC for Family Office services and enjoy effective coordination of financial, legal and risk management needs. We will act as an intermediary and advisor for estate planning, tax services, cash flow management, and investment strategy and implementation. We will also provide liability management and guidance on philanthropic and wealth transfer decisions.

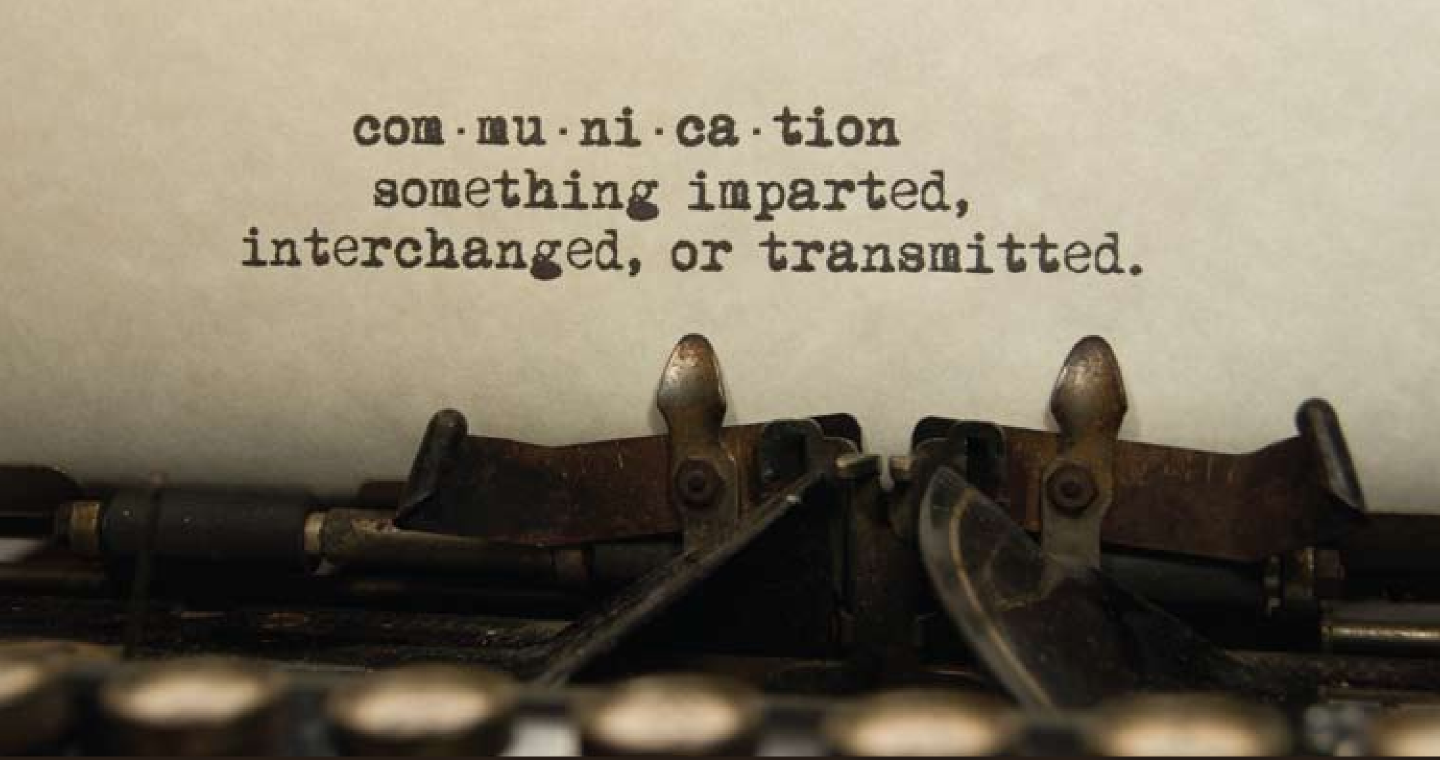
Our complete knowledge of your family objectives, values and priorities reduces the burden on you to meet with and coordinate multiple advisors. Now you can make decisions about your money and life with confidence.

Our client promise

- Objective financial advice
- Creative solutions to financial problems
- Consistent service
- Sophisticated financial vision

If you are looking for responsive care, integrity and professionalism in your personal and business affairs, let MWE Wealth Solutions help fulfill your expectations.

Here's how we work.



Our difference

For decades, the certified public accounting firm of Margolin, Winer & Evens LLP has helped clients with their financial, wealth transfer and estate planning needs. The firm has also supported clients through important life transitions such as marriages, new grandchildren and the death of loved ones. Clients often call for help with critical life decisions because the people at MWE understand how personal lives flow seamlessly into business and professional concerns. This desire by MWE's clients to take a more active role in their overall wealth management vision is the driving force behind MWE Wealth Solutions.

At MWE Wealth Solutions, all but a few of our services are provided in-house because we have the training and knowledge to be a one-stop provider for closely-held business owners and their families. That's our difference: wealth solutions built on CPA experience.

The family office

You've built your life around deeply held values, interests and beliefs. Through the unique Family Office services at MWE Wealth Solutions, we help you focus on three fundamental desires:

- **Family Independence.** Retain and grow sufficient financial resources to protect financial security and maintain an existing lifestyle.
- **Family Legacy.** Enable the transfer of what a family has to whom they want, when they want, the way they want.
- **Social Capital Legacy.** Allow the direction of resources to charitable purposes, consistent with pre-defined values.

Our knowledgeable team asks questions and recommends options and opportunities to develop your Blueprint for Success.

Our blueprint process: four steps

1	Discover Priorities	Review six key life areas: financial, philosophical, emotional, spiritual, behavioral and physical. Identify working connection between family financial status and financial philosophy.
2	Establish a Plan	Construct strategies around discovery results. Review any existing wealth management plans. Make recommendations on key advisors. Assemble appropriate menu of services.
3	Blueprint for Success	Personally present customized financial blueprint. Review, modify and ensure client approval of final plan.
4	Implement & Monitor	Manage implementation of plan strategies. Monitor performance through advisor and client online tracking tools. Schedule regular meetings to adjust plan to life or business needs.

If this describes you...	You may benefit from...
"I spend part of the year in another country and need assistance with managing my personal affairs."	Integrated Financial Strategies Liability Management Performance Measurement & Analysis Client Recordkeeping & Reporting Personal/Concierge Services
"All of the assets and investments were handled by my husband, and his illness has left me feeling overwhelmed and worried about how to handle it all."	Investment Strategy Implementation Liability Management Client Recordkeeping & Reporting Family Continuity & Client Education Personal/Concierge Services
"I just sold my business and need advisors to assist in the management and monitoring of my changing personal and financial life."	Wealth Transfer Planning Investment Strategy Implementation Integrated Financial Strategies Performance Measurement & Analysis
"I own a business and want to properly invest the assets for future income and wealth transfer planning."	Wealth Transfer Planning Investment Strategy Implementation Trusteeship Services Private Business Services Client Recordkeeping & Reporting
"I've been really blessed and want to establish avenues of financial support for children, grandchildren and causes I believe in."	Wealth Transfer Planning Liability Management Trusteeship Services Family Philanthropy & Personal Gifting Family Continuity & Client Education

Wealth Transfer Planning

Investment Strategy Implementation

Integrated Financial Strategies

Liability Management

Trusteeship Services

Family Philanthropy & Personal Gifting

Our customized services

Private Business Services

Performance Measurement & Analysis

Client Recordkeeping & Reporting

Family Continuity & Client Education

Personal/Concierge Services

Tax Planning & Compliance