Weston Wealth Strategies

Empowering lives of vision and purpose

Wealth management

Education planning

Retirement planning

Philanthropy

Estate planning

Investments

Insurance

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Premium Investment Management

Our Premium Investment Management gives you a complete picture of all your investments including performance, allocations, and outlook. Whether you have one brokerage account or many, we provide unified reporting, oversight, and practical guidance based on your combined portfolios.

First, we work with you to clearly articulate your priorities. Then we aggregate your portfolio data and perform various analyses to develop a detailed understanding of your personal needs, long-term goals, risk tolerance, and current investment position. This is documented in an investment policy statement and investment recommendation which includes a recommended portfolio, comparison with your existing portfolio, illustration of hypothetical returns, and suggested alerts.

Premium Investment Management applies specific performance metrics which we use continuously to monitor and enhance your personalized investment strategy to help keep you on track.

We will review results and changes to your financial position and goals in quarterly review sessions. At these meetings we will provide you with a quantified snapshot of the state of your complete portfolio, current versus target asset allocations, investment detail reports, gain/loss information, performance by asset class, performance review, and a fine-tuning of your investment strategy.

We take great pride in developing strong professional and personal relationships with our clients. We understand that our job is to help you realize your goals, and we take that very seriously. Our personal commitment is to you, your family, and your vision for the future.

Securities offered through Investors Capital Corporation, (800) 462-4610, Member FINRA/SIPC

Advisory Services offered through Investors Capital Advisory, (800) 949-1422, 230 Broadway, Lynnfield, MA 01940

Weston Wealth Strategies, LLC is appointed and licensed to sell insurance in AZ, CT, DE, NY, NJ, CA, FL, ME, MA, OH, RI & SC, and to sell securities and financial products in AZ, CT, NY, NJ, CA, FL, ME, MA, OH, & SC