

It's Your Timeline

Take control of your financial present and future. Find the balance between enjoying your life now and making sure you reach the retirement of your dreams.

Growth & Income

Growth



Platt Wealth Management is an independent, fee-only firm offering investment management and financial planning.

We are an experienced team of professionals who take the time to get to know you. We ask the questions that help you and your family think about dreams you never thought possible.

We would love to listen to your story, hear your concerns and goals, and answer any questions you may have.



It's Your Story

Your financial plan tells a story about your values and dreams. Live your best life, knowing you can achieve your financial goals on your journey.

Capital Preservation

Income



20s

Learn the Basics

I'm early in my career, so I need to learn more about finances and the benefits package that comes with my job. Should I contribute to my 401(k), my Roth IRA, or pay down my student loan? I might start my own business.

30s

Build a Foundation

I want to build a strong financial foundation for my family. Our finances are more complex. We need advice on mortgages and insurance to make sure our home and family are protected. Childcare is expensive, so we'd like to know if one of us can afford to stay home or work part-time?

40s

Time to Delegate

My time is at a premium with work demands and family obligations. I want to make sure I'm making the right decisions about my taxes, stock options, and deferred compensation. Am I saving enough for retirement? I need to make sure my portfolio is invested in the right way.

50s

Mid-life Evaluation

I got an AARP card in the mail! My top priority is making sure I'm prepared for retirement. I want to know what life looks like if I sell my business now or change careers. I have accounts all over the place and recently received an inheritance. I'd like to consolidate and simplify things.

60s

Transition Plan

I look forward to retiring, but it's strange to think about not working and taking money out of my accounts. I need some help choosing the best options from Medicare and Social Security. I want to travel and have fun now, but make sure I won't run out of money if I live into my 90s.

70s+

Live Well

I want to make sure my finances are in order so my portfolio lasts the rest of my life and also provides for my family. I'd like to pay for college for my grandchildren. I want to leave a legacy to the charitable causes that I care about.