

Wiseman & Associates has organized an exceptional team of professionals who offer unique financial strategies. Our advisory team has been selected for its experience in various specialties—wealth management and financial planning, estate planning, and risk management—and we work together to design a financial solution that achieves your goals.

Philosophy

- Conservative, value-oriented approach
- Highest quality investment options
- Ongoing systematic research
- Review of portfolio funds
- Tax-efficient strategies
- Asset preservation through risk management

Performance Tools

To seek strong performance, we use the following disciplines to manage assets:

- Team management approach
- Experienced portfolio managers
- Consolidated performance reporting

Financial Strategies

Analyzing financial positions to develop individualized plans, including:

- Objective, prudent advice
- Investment management
- Insurance needs analysis
- Retirement planning
- College savings

Estate Strategies

- Creative tax-advantaged planning
- Life, disability, and long term care insurance to protect estate assets and provide for family
- Smooth transition from generation to generation

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Wiseman & Associates
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3/2008