# ABOUT PRESTIGE

PRESTIGE
Wealth Management Group
*Your Personalized CFO*

## WHO IS PRESTIGE—WHY DO CLIENTS CHOOSE US?

*By working collaboratively, the Prestige team of employees create a seamless, consistent customer experience. Unlike the big wire houses, Prestige is dedicated to knowing their clients on a personal level. Developing and building a long lasting relationship is our goal. The Prestige team wants you to know we are here for you through whatever life's twists and turns may deliver. Walking with our clients through an ever changing world, we build a financial life plan customized for them and their financial goals and dreams.* ***From investment management, retirement, tax and estate planning, Prestige delivers a personalized and proactive approach to your financial planning needs.***

### STAYING IN TOUCH

At Prestige Wealth Management Group, our clients are proactively contacted to schedule regular meetings with their advisor to discuss and review their portfolio and update their financial plan. Our team knows how fluid your life plan can be and how important it is to stay current on what's going on in your and your families lives. We also know that life is busy these days and time gets away from you. That's why we reach out to you to schedule in person meetings, phone calls or video conferencing meetings with your advisor to ensure you are making the best decisions for your future.

### INDUSTRY LEADING TECHNOLOGY

With technology constantly evolving, Prestige diligently works to provide our clients with an encrypted, user friendly online access tool that allows them to view and monitor their aggregated financial accounts, financial plan and document vault. Clients also have access to our main website that offers a wide range of beneficial resources, video tutorials and a library of articles on various topics pertaining to Retirement, Investment, Estate, Tax and Lifestyle.

### WE TREAT YOU LIKE FAMILY

Clients choose Prestige not only for our staff's collective knowledge in the financial industry, but also because they know they are working with a team of professionals who are friendly, warm, sincere and care about their needs. It is the Prestige standard to make sure our clients receive a warm and sincere greeting and a fond farewell each and every visit. Our Director of First Impressions, Eileen, with the firm for over 10 years, knows all of our clients on a first name basis. She loves to catch up with them about their recent trips, experiences with grandchildren or whatever new stories the clients have to share. Our advisors help create plans not only for this generation but for future generations and are a resource for them if the unexpected happens. All employees of Prestige believe in making a positive impact in our client's lives.

### EDUCATING OUR CLIENTS

At Prestige we host several events throughout the year to continuously educate and keep our clients informed. World Renowned Economists and other Industry Leading Speakers join us to discuss the current world market conditions and other issues that may be imperative to keep our clients alerted to and up to date on various topics. For example, we have had Identity Theft Specialist, FBI and other key specialists join us to give presentations on helping our clients avoid fraud, identity theft and other critical issues. Also, to keep our clients current on important economic conditions, we host quarterly webcasts, along with sending quarterly newsletters and weekly articles.

### TEAM APPROACH

The Prestige staff works collectively and collaboratively for each of our clients. When a client calls into Prestige, they are not put into a "queue" system, they reach a friendly team member dedicated to helping them get the answers they need to whatever they are calling about. At Prestige it is our goal to make every possible effort to return calls within 2 hours of receipt of any message. As a client of Prestige you are not just hiring an Advisor you have a team of people who work for you and helping you achieve your financial goals and dreams.

31 State Route 12 • Flemington, New Jersey 08822 | 908-782-0001
Schoolhouse Plaza • 374 Millburn Avenue • Millburn, New Jersey 07041 | 973-532-6770
800-743-4768 • pwm@prestigewmg.com • www.prestigewmg.com
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