

Financial Planning

At WRP, we believe that the best financial advice encompasses all of the core aspects of wealth management. With expertise in financial planning, investment, stock options, and tax planning, WRP offers a distinctive suite of services that sets us apart from other financial and tax firms.



WERBA RUBIN PAPIER

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Financial planning

With a fierce commitment to integrity and sound guidance, WRP will work with you to craft a personalized, tax-efficient financial plan. We adhere to the highest fiduciary standards, working on a fee-only basis to ensure your best interest is always at the core of our advice.

Define your goals.

Before discussing strategy, your WRP advisor will meet with you to clarify your financial goals. Unlike many of the larger firms that take a one-size-fits-all approach, sorting clients into modeled portfolios based on their profiles, we sit down with each new client to get a detailed vision of their unique priorities, goals, and needs. After we have a solid picture of where you want to go, we'll develop an effective plan to get you there.

Make a plan.

WRP will use Nobel Prize-winning investment strategies to create a personalized financial plan to reach your financial goals. We work closely with our partner, WRP Tax, to ensure tax efficiency. We'll help your money work for you with strategies such as

- Alternative minimum tax mitigation
- Charitable planning
- Estate planning
- Tax-loss harvesting

Stay on track.

Your WRP advisor will meet with you regularly to make sure you remain on course to meet your goals. You'll also have access to a personal online portal, where you can view your entire plan and its progress anytime.

Why Work With WRP

We Have the Expertise to Protect Your Financial Future

Most firms can help you with either tax or financial planning. WRP employs expertise in both fields to bring you the very best in financial management service, guiding sound investment choices with a sharp eye on the tax implications that come with them. Specializing in financial planning for professionals in pre-IPO companies, we can help you save money by guiding you through the complex financial issues that come with receiving company stock options and your company's IPO. With a personalized approach to financial management, WRP will design a unique plan based on your goals and risk tolerance and then fuel its success with evidence-based investment strategies.