

# Investment Management

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

[wrpwealth.com](http://wrpwealth.com)

(408) 549-8533

## Investment Management

WRP works on a fee-only basis and adheres to the fiduciary standard, ensuring that your financial best interest is the only consideration behind our investment advice. We can help you build wealth faster by making your money go farther.

## Investment Selection

WRP will help you choose investments to help you grow your wealth and reach your goals. We'll find low-cost and tax-efficient investments that can let you keep more money in your own pocket and help you create a better world.

- Tax-advantaged investments
- Personalized ESG portfolios
- Bond ladders
- Intelligent diversification
- Low-expense funds

## Active Management

Your WRP advisor will meet with you regularly to ensure your strategy remains efficient and on track.

- Active, granular tax loss harvesting
- Evidence-based investment strategy
- Synthetic dividend planning
- Asset management
- Cashflow management
- Real estate transactions

## Retirement Planning

WRP will help you build toward the retirement you want and preserve your nest egg after you stop working. We can help you make the most of tax-advantaged retirement accounts and structure a distribution strategy that minimizes your tax burden in retirement.

## 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.