BUILDING YOUR FINANCIAL HOUSE ONE BRICK AT A TIME

WHAT WE DO

We specialize in providing goal-oriented solutions to individuals, institutions, foundations and endowments. We Provide investment management, financial planning, and asset protection services tailored to our client's specific needs.

INDEPENDENCE

As an independent firm, we are not influenced proprietary products sales or corporate ties. But through our affiliate, Cetera Advisors LLC, we have broad access to research, operations and back office support.

FROM YOUR PERSPECTIVE.

We review all financial matters from our client's perspective. This level of empathic understanding is critical to our ability to provide clients appropriate solutions.We prepare and implement customized plans which will often integrate financial planning, investment management, estate planning, and asset protection strategies.

OUR VISION

Our goal is to provide our clients financial confidence.

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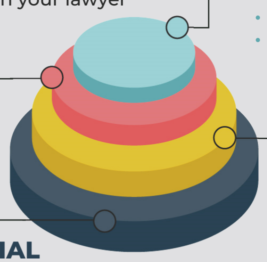
PERROTTO PRIVATE WEALTH

ESTATE PLANNING

- Proper documentation
- Help avoid probate
- Work with your lawyer

ASSET PROTECTION STRATEGIES

- Evaluating Exposure
- Insurance Needs Analysis
- Tactical Planning



INVESTMENT MANAGMENT

- Strategic Asset Allocation
- Disciplined Portfolio Rebalancing
- Retirement Income Strategies
- Comprehensive & Goal Oriented

FINANCIAL PLANNING

- Cash Flow Analysis
- Transistion Planning
- Life plan

Investments in securities do not offer a fix rate of return. Principal, yield and/or share price will fluctuate with changes in market conditions and, when sold or redeemed, you may receive more or less than originally invested. No system or financial planning strategy can guarantee future result.Securities and advisory services offered through Cetera Advisors LLC, member FINRA, SIPC. Cetera is under separate ownership from any other named entity.Financial Advisors of Cetera Advisors LLC, may only conduct business with residents of the states and/or jurisdictions in which they are properly registered. Not all of the products and services referenced on this site may be available in every state and through every advisor listed. For additional information please contact the advisor(s) listed on the site, visit the Cetera Advisors LLC site at www.CeteraAdvisors.com

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MEET DAVID PERROTTO OF PERROTTO WEALTH

With over decadein the financial industry and over five years with my own private practice, my strengths are Portfolio Advising, Retirement Coaching, legacy planning,and Tax Bracket Management.

Once I take a client on, I become a friend, mentor, and partner. As my client's goals, and situation's change, I am there every step of the way, helping them build their financial house, one brick at a time.

My vision is to prepare clients for retirement, build their financial foundation, and help them think long term: How to continue to build wealth with interest and dividend paying vehicles that generate income, to capitalize on all areas of protection, such as Life/Disabilityinsurance, while stretching their dollars as far as we can through advanced tax bracket management strategies. What is most important to me is making sure client's feel they have a well-planned future.

DISCOVERY

Before we get to crunching numbers, well talk about the things that are most important to you - family, community, hobbies & pastimes. We'll ask a lot of questions about what you're really thinking, feeling, worried about; your experiences with money; and what you accomplished so far. Together we'll figure out where you are now.

PLANNING

Based on what we discussed in the discovery phase, we will assess your personal situation, gauge where you are now relative to your life goals and priorities, and consider what gaps exist. We will weigh the financial implications of each goal we discuss and construct a framework for a plan that supports them.

SOLUTIONS

A benefit to holistic planning is that it provides a comprehensive view of all areas of your financial life. During this phase, we will recommend specific solutions to help match each of your goals. This is where we implement your customized plan.

MONITORING

Just when you make plans, life happens and events large or small can change everything. The monitoring stage incorporates tracking systems to keep your plan on target. We'll help you plan for the unexpected, anticipate change, and adjust your plans over time, as necessary.

YOU WOULDN'T TRUST JUST ANYONE WITH YOUR PHYSICAL HEALTH. WHY TRUST ANYON **WITH YOUR FINANCIAL HEALTH?**

LIFE MILESTONES

We tailor your plan based on where you are in your life

GETTING MARRIED

Purchase first home
Purchase disability insurance
Diversity your portfolio

NEW CHILD

Develop a college savings plan
Purchase life insurance
Establish basic estate plan

PLAN FOR RETIREMENT COLLEGE

Develop a retirement plan
Finance College education
divesity your portfolio

EALY RETIREMENT

Update estate planning if need
Establish retirement plan distribution strategy
Explore Charitable giving options

CHANGING JOBS/DIVORCE

Consolidate retirement assets
Refinance/new mortage
Update will/trust/POA

RETIRING PARENTS PARENT CARE

Explore assisted living options
Create a comprehenive estate plan
Disperse retirement income

LEGACY PLANNING

Move all assets to beneficiaries
Purchase second home
Diversity your portfolio

LATE RETIREMENT

Update will/estate plan
Start taking IRA RMD's at 70
Manage medical expenses
Make assisted living arrangement