DWM is committed to protecting and enhancing your net worth and legacy in an engaged environment with our dedicated, caring team.

DWM provides Total Wealth Management (click here), assisting you with all aspects of your financial life:

- Investment management
- Value-added services
- Relationship management

DWM is a Fee-Only Fiduciary Registered Investment Advisory ("RIA") firm:

- We are required by law to put our clients' interests first. This means you will receive conflict-free, objective advice.
- We take no commissions or compensation other than the agreed-upon fee you will pay us.
- We are members of NAPFA, the National Association of Personal Financial Advisors, which is the country's leading association of Fee-Only financial advisors- highly qualified, experienced and vetted professionals. This means you will be working with the best.

DWM uses proprietary and prudent processes in all aspects of our work. These processes are performed consistently by our highly qualified and engaged team within a client-centric, value-driven culture.

DWM is a boutique. We work with a select number of individuals and families. Unlike a big bank or wirehouse, where you might just be a number, relationships with DWM are very special. Like you, our focus is on your financial future. We may or may not be the best fit for you. And, you may or may not be the best fit for us. Let's talk.