Wright Wealth Management Group

Private Client Services

Welcome to Wright Wealth Management's Private Client Services, a proactive approach to wealth management for high-net-worth individuals and families.

What is Private Client Services?

WWMG's Private Client Services includes an elevated level of service and premium benefits to those households with $750,000 in assets or more with our firm.

Premium Service

Your call or email will be returned within 24-48 hours. You will be assigned a designated client liaison for your inquiries and service requests. In addition, you have the option of 3 annual reviews instead of the standard 2 per year.

Ongoing Advice & Analysis

You will receive calls and ongoing advice from a team that knows you personally and the particulars of your financial needs. From distribution planning, portfolio reallocation and professional referrals, our team will be available as market conditions shift and evolve.

Events

As a Private Client, you will receive an invitation to all of our events. This includes two exclusive events per year for Private Clients and their guests.

Access to the Experts

Should you require additional investment insight, we will schedule a call directly with a fund manager or investment executive.

Technology

We're excited to announce the addition of Orion software. Orion is available on either your desktop or mobile device and is a great way to keep up-to-date on the performance of your managed accounts.

Wright Wealth Management Group
Managing Wealth the Wright Way

3181 Clearwater Drive, Suite A Prescott, AZ 86305 | (928) 777-0446 or (866) 528-7233 | www.wrightwealthmanagement.com