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 Service?

Wright Wealth Management Groups Private Client Service 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 and 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 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 offer online and mobile access to you allowing you to keep up to date on the performance of your managed accounts.