WISER®
WEALTH MANAGEMENT

Guiding you to financial freedom through life's pivotal moments.

Wealth Management &
Financial Planning

WHO WE ARE

WISER WEALTH MANAGEMENT

is a **fiduciary**, **fee-only** investment advisory firm located in Marietta, Georgia. As a fee-only firm, we do not receive commissions or sell any financial products. We are also held to a fiduciary standard, requiring us to act in the best interest of our clients.

"Wiser was founded over 25 years ago with one goal, to empower people to make confident decisions about their finances, so they can stop worrying about them and start enjoying life. We strive to help people achieve financial clarity so they can focus less on their money and more on living their life."

Casey T. Smith
President, Wiser Wealth Management

OUR CORE VALUES

TRUSTWORTHY

We are honest, truthful, and dependable. We show respect to our clients and earn their trust by acting with integrity.

SERVICE-MINDED

We are mindful of our client's spoken and unspoken needs and are driven to find solutions to their problems.

EMPATHETIC

We listen to our client's concerns and empathize with their individual circumstances and concerns.

PROFESSIONAL

We represent our brand in a professional manner and always err on the side of being conservative in our behavior.

ACCOUNTABLE

We take the initiative to solve problems and hold ourselves accountable for our actions.

OUR SERVICES

WEALTH MANAGEMENT

Wiser offers a unique wealth management experience, combining ongoing comprehensive financial planning with strategic portfolio management.

FINANCIAL PLANNING ONLY

For a one-time flat fee, we create a comprehensive financial plan tailored to your goals, empowering you to take control of your finances with confidence.

What's Included with Each Service	Wealth Management	Financial Planning Only
Financial Planning:		
Retirement Planning	✓	✓
Tax & Estate Planning/Strategy	✓	✓
Risk Management/Insurance Analysis	✓	✓
Education Planning	✓	✓
Professional Referrals (CPA, Attorney, Insurance)	✓	✓
Collaboration with Professionals	✓	
Investments:		
Portfolio Management	✓	
Retirement Cash Flow Management	✓	
Asset Allocation Recommendations	✓	✓
Advanced Portfolio Strategies	✓	
Support:		
Unlimited Advisory Team Access	✓	
Account Consolidation & Transfers	✓	
Proactive Financial Plan Updates & Review Meetings	✓	
Online Client Portal	✓	✓
Cost:		
Fee Structure	% of Assets Under Management	One-Time Flat Fee

OUR PROCESS

MEETING 1: CONSULTATION

In this complimentary meeting, we get to know each other, discuss your goals, and see if we are a good fit. We explain our services and what working with us will look like.

MEETING 2: DISCOVERY

You provide your personal and financial information so that we can discuss your financial goals for the future including investments, retirement, tax strategies, business planning, college savings, estate planning, risk management and insurance.

MEETING 3: DESIGN

We present a draft of your financial plan and our recommended action items to reach your goals and objectives. We will talk through the different options in your plan and make adjustments as necessary.

MEETING 4: DELIVERY

We deliver your financial plan, make recommendations for asset allocations in any outside accounts, deliver custom allocations for your 401(k), provide referrals within our network of professionals for a CPA, estate attorney, life insurance professional, and/or property & casualty insurance agency as needed. After 100 days, we will check on your progress and see if you've implemented your action items.

ONGOING SUPPORT

Wealth Management Clients

As a Wealth Management client, you gain a dedicated partner overseeing every aspect of your financial life. We implement your customized investment strategy aligned with your goals, while continuously monitoring and refining your portfolio as markets and circumstances evolve. Beyond investments, we provide proactive guidance each year both during your annual review meeting and behind the scenes with tax strategies, estate planning, insurance and risk management.

Financial Planning Only Clients

At this point, you are responsible for executing your financial plan and following through with our recommendations. As life circumstances change, we're available to adjust your plan on an hourly basis, ensuring it stays aligned with your evolving goals.

GET TO KNOW WISER

A WISER RETIREMENT® PODCAST

From retirement strategies to investing tips and financial planning guidance, our goal is to empower you with the knowledge you need to make smart financial decisions. Join us every week as we simplify complex financial topics, share real-life success stories, and guide you on your journey to financial freedom!

BLOG

Our blogs offer insights and practical advice on all aspects of financial planning. From budgeting to retirement, we cover it all and provide guidance for every stage of your financial journey.

YOUTUBE CHANNEL

Discover weekly financial education videos designed to empower you on your financial journey. Subscribe to our channel for practical tips to help you achieve your financial goals.

FEE ONLY NETWORK MEMBER

NAPFA THE NATIONAL ASSOCIATION OF PERSONAL FINANCIAL ADVISORS

FPA FINANCIAL PLANNING ASSOCIATION

99%

CLIENT SATISFACTION

BBB ACCREDITED BUSINESS BBB RATING A+

99%

CLIENT RETENTION

(Over the last 5 years)

WISER WEALTH
MANAGEMENT

WEALTH MANAGEMENT & FINANCIAL PLANNING

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