

WEALTH MANAGERS

COMING THIS AUGUST

The August issue of *Rhode Island Monthly*, which is also **The Best of Rhode Island** issue, will feature sponsored profiles of area **Wealth Managers**. Our readers have the financial resources that make them a great target audience for your services. Showcase your business and services to our affluent, educated readership.

SPECIAL PROMOTIONAL SECTION
Wealth & Legacy/Wealth Manager



FINANCIAL ADVICE AND FAMILY WEALTH PLANNING

Joanne cares deeply about her clients and has made it her mission to help her clients gain greater control of their financial life, make smart well-informed decisions about their money and plan for a secure financial future. Joanne's practice includes individuals, couples, doctors, professors and business owners, but many of her clients are women who have become solely responsible for their financial future after experiencing divorce, death of a loved one or inheritance of significant wealth.

Joanne knows personally how important it is to be involved in your finances, since her mother became a widow at forty-five and her sister went through a divorce after twenty-five years of marriage. Joanne saw first-hand the financial and emotional stress that can result from not being prepared, which is why she ensures that if something happens to her spouse, the other will be better prepared to handle their financial affairs.

Joanne acts as her clients' financial coach and personal CFO, collaborating with their lawyers and CPAs to create a holistic wealth plan that incorporates their personal values and goals. She provides tailored portfolio strategies and financial solutions to help clients enhance, preserve and protect their wealth so they can achieve what's most important to them.

Though Joanne's office is in Providence, she often meets with clients in their home, office or the Firm's Newport office. She also meets with clients through video conferencing. Joanne has more than twenty-five years of combined wealth planning and prior CPA experience. She is on the board of the Women's Fund of RI, Girls Scouts, RI Elder Info and G/W/C Women's Club of South County, as well as an active volunteer with Christ the King Parish, United Way, Leadership RI, South County Hospital and RI Society of CPAs.

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240 WORDS

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RHODE ISLAND MONTHLY | AUGUST 2020 99

FULL PAGE EXAMPLE

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RHODE ISLAND MONTHLY | AUGUST 2020 3

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- Leaders in our community and businesses
- 72% with college degree or higher
- Average household income of \$223,700
- 59% net worth of \$500,000 and over

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