



CHERRY BEKAERT

Wealth Management

Cherry Bekaert Wealth Management offers clients thoughtful and attentive investment advisory services provided by a team of experienced and objective advisors. Whether your needs center on wealth management or retirement plan consulting, we understand that your focus is on wise financial stewardship, which aligns with your overall mission and vision.

At Cherry Bekaert Wealth Management we believe that the primary way we make a difference is to focus on how we serve you, not just what we do for you. Each day we strive to provide a unique and fulfilling client experience that adds value to your organization or personal situation and exceeds your services expectations.

Mission Fulfillment
Retirement Readiness
Navigating the Course
Fiduciary Excellence
Mission Alignment
Financial Preparation

Wealth Management

Does your investment portfolio support your objectives and goals?

Have you assessed your financial independence?

Have you assessed the interaction, efficiency and efficacy of your investment portfolio and related services?

- ▶ Wealth Accumulation & Preservation
- ▶ Wealth Transfer
- ▶ Risk Management

Retirement Plan Consulting

Does our retirement plan support the company's mission?

Are employees actually prepared for retirement?

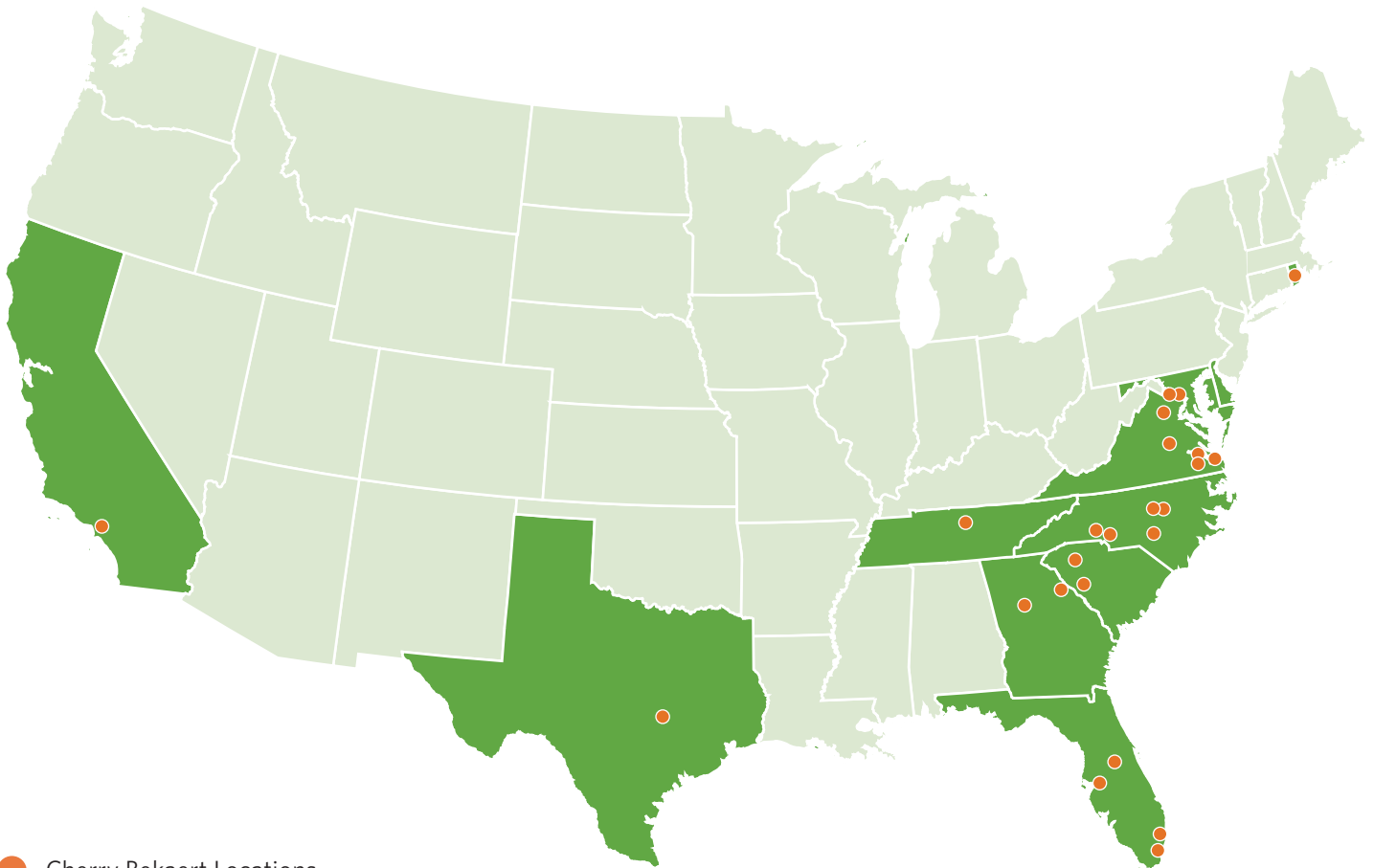
Am I ready for a Department of Labor audit?

- ▶ Mission Fulfillment
- ▶ Retirement Readiness
- ▶ Fiduciary Excellence

Cherry Bekaert Wealth Management

Cherry Bekaert Wealth Management LLC is a subsidiary of a Top 25 accounting firm in the United States, Cherry Bekaert LLP. Together we have delivered quality wealth management and retirement plan services for most of our combined 70+ year history.

With more than 1,200 professionals throughout the Southeast and Southwest United States and serving clients across the U.S. and Internationally, Cherry Bekaert LLP and Cherry Bekaert Wealth Management LLC offer timely, integrated wealth and tax management, simplifying the process and removing the burden of service provider coordination from our clients.



cbhwealth.com



About Cherry Bekaert Wealth Management

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