

Solutions & Resources: Investment Management Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

Are your investments working to accomplish your financial goals?

Whether you desire an early retirement, need income in retirement or want to provide a generous legacy to your family, the right mix of investments will help assist you toward accomplishing this goal.

The team at Domani Wealth offers the expertise to help you navigate that path. The process begins with in-depth conversations.

Our advisors will talk with you about personal and family financial goals, as well as your feelings about risks and expectations.

These discussions will help us develop a customized investment plan designed to help meet your needs. They also allow our experienced team of financial professionals the opportunity to explain your options and answer your questions.

When you choose investment management and monitoring, the Domani Wealth team will:

- Evaluate investment strategies through rigorous due diligence and monitoring
- Recommend select securities and other financial products to help meet your goals
- Regularly monitor investments and securities selected in your portfolio
- Assess new investment opportunities to determine if they meet your needs
- Meet with you regularly to access or review your goals and ensure your portfolio continues to support your goals

Domani Wealth is an independent fee-only wealth advisory firm. You can feel confident that our wealth advisory team will provide you with conflict-free investment management and monitoring that place your needs first. Let Domani Wealth guide your investments allowing you to see what's possible for tomorrow.

Build a path today that leads to tomorrow's financial goals.



With the experts at Domani Wealth by your side, you will always have a team of experienced advisors for all of your investment needs. Take control of your investments and put them to work for you.

Contact the experienced advisors at Domani Wealth to evaluate your current investment plan or create a new plan designed to help you achieve your goals, while taking your individual timeframe, tax bracket and risk profile into consideration.

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/ or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

Please remember that it remains your responsibility to advise Domani Wealth, in writing, if there are any changes in your personal/ financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

The scope of the services provided depends upon the needs of the client and the terms of the engagement.