

Wealth Management / Investment & Tax Consulting

Wealth managers focus on the finance and investment strategies of private clients. Their clients include entrepreneurs, C-Suite executives, family offices, high-net-worth individuals as well as the business and charitable ventures of these clients. A wealth manager is responsible for investment management, life insurance considerations, risk management as well as retirement planning, tax planning, and estate and gift planning. In public accounting and banking this practice is often referred to as "Private Client Services" or "Private Wealth Advisory Services."

Beneficial Professional Designations

- CPA
- CFA
- CPA-PFP
- CFP

Sampling of Employers Hiring our Students

- JP Morgan Chase
- Goldman Sachs
- Citigroup
- UBS
- Bank of America
- Merrill Lynch

Strongly Recommended Courses

- Financial Statement Analysis
- Investment Management
- Wealth Management