Foster & Motley
FOSTERING LIFE'S WEALTH

Helping you live your most meaningful life

We support you with a variety of services to ensure your financial success.

Initial Consultation
We work with you to understand your goals and what you want your money to do for you.

Dedicated Professionals
At the ready, your entire team stays close to you and your finances.

Ongoing Meetings
Trust is paramount in any wealth management relationship. We make time for ongoing face-to-face meetings to fit your schedule and supplement with consistent communication.

Portfolio Management
Integrating your financial goals and needs into a customized, broadly diversified investment portfolio.

Aggregated Asset Management
Taking a holistic approach to investing your employer plan(s), personal savings, and other assets.

Net Worth Analysis
Building a clear picture of your net worth including all assets and liabilities, even beyond the accounts we manage.

Cash Flow Analysis
Mapping and anticipating how money moves in your life.

Retirement Analysis
Providing tailored advice to your personal lifestyle goals to build confidence in life's next chapter.

College Planning
Helping you create a plan to fund your family's education goals.

Family Involvement
Facilitating conversations about the transfer of your wealth.

Estate Planning
Designing a path that seeks to meet your legacy goals.

Tax Planning and Preparation
Identifying opportunities to minimize your taxes, in order to maximize your wealth.

Private Investment Opportunities
Sourcing exclusive investment opportunities and conduct due diligence to diversify client portfolios.

Stock Option Planning
Developing strategies to help maximize the value of your stock options.

Insurance Analysis
Assessing and helping align your existing coverage with protecting your savings and financial future.

Charitable Giving
Sharing your passion, we explore various angles to make sure your wealth goes as far as possible in serving the causes close to your heart.

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