How We Help Clients

Transactional

The benefit of working with an independent, full service, financial firm such as **NextGen** Wealth Services is that we are always able to offer suitable recommendations for every client's unique situation and needs.

After providing a complementary introduction meeting where we learn more about your current financial strategy, we will offer recommendations to fill any potential gaps that our team may notice.

Depending on the service provided, an asset management fee based on the account value or a commission will be earned based on the transaction.

Our transactional services include:

Asset Accumulation

- Traditional and Roth IRA review
- 401k consolidation
- Planning for college costs
- Saving for large purchase

Risk Management

- Portfolio risk tolerance review
- Life insurance need analysis
- Disability income protection
- Long term care coverage