Kolinsky Wealth Management

Financial Guidance Since 1982

THE POWER OF PARTNERSHIP

Strategies for Success

AS A TRUSTED ADVISOR, YOUR CLIENTS OFTEN LOOK TO YOU FOR RECOMMENDATIONS AND...

Kolinsky Wealth Management can help you strengthen the relationships you have with your clients, by expanding the range of financial services and solutions that you can offer to them, while still maintaining your independence and objectivity.

We are committed to forming professional alliances that provide our partner firms access to a high level of expertise in the implementation of investment advisory services, retirement plan design and consulting, estate planning, & 1031 tax deferred exchanges.

Kolinsky Wealth Management is committed to the highest standards of professionalism. We serve clients with creative, comprehensive solutions that are designed to match their specific needs.

As your Professional Partner, we are uniquely positioned to offer a key alliance that gives you a competitive advantage in supporting your individual and corporate clients.

A COMPREHENSIVE RANGE OF RESOURCES AND CAPABILITIES

Investment Advisory Services

› Asset Allocation Modeling
› Institutional Asset Management
› Seperate Managed Accounts
› Alternative Investments - Real Estate Partnerships
› Mutual Fund and ETF Portfolios
› Ongoing Monitoring and Comprehensive Reporting

Retirement Plan Design and Consulting

› Profit Sharing, 401(k), Defined Benefit Plans
› Fee Benchmatrking and Vendor Analysis
› Participant Education Services
› Actuary & Plan Document Services

1031 Tax Deferred Exchanges

› Defer Capital Gains Tax When Selling Business or Investment Properties
› We Offer Many Types of Exchange Properties
› We Work Closely With Your QI (Qualifies Intermediary)

Estate Planning/Wealth Transfer

› Tax-Efficient Wealth Transfer
› Estate Liquidity Needs
› Estate Tax Reduction Strategies
› Gift Leveraging

Business Planning Strategies

› Executive Benefits
› Buy-Sell Agreements
› Key Man Insurance
› Corporate-Owned Life Insurance

Risk Planning Strategies

› Income Protection Planning
› Life Insurance
› Long-Term Care Insurance
› Disability Insurance

…FINANCIAL IDEAS BEYOND THE SCOPE OF YOUR SPECIFIC AREA OF EXPERTISE.

An Enhanced Scope of Service and Support

Kolinsky Wealth Management has a vested interest and professional commitment to support your client relationships with a full range of financial solutions offered by many of the leading financial institutions in the world.

Because we are independent, we are not locked into singular relationships with any financial institutions, and are free to recommend a wide range of potential solutions.

Most importantly, your participation and guidance are key parts of this process. We work together to make sure your clients' needs are met through our combined energies, talents and resources.

A Strategic Alliance Built to Strengthen Your Client Relationships

Kolinsky Wealth Management works hard to demonstrate value-added service to your clients. In keeping with this philosophy, we are obligated to uphold stringent professional standards and integrity when working with clients. This includes focusing on:

- Confidentiality of all your Client Files
- Clear Client Disclosures
- Competency and a High level of Expertise
- Objectivity, Due to no Quotas or Proprietary Products

Partner With Us

What separates our firm from other organizations is our commitment to providing solutions, not just financial products. We develop and implement solutions that are designed to match your clients' needs and lifestyles.

For more information or to schedule an appointment, please contact us at (201) 474-4011 or via email at info@kolinskywealth.com.

KOLINSKY WEALTH MANAGEMENT IS DEDICATED TO HELPING OUR PARTNER FIRMS DEEPEN THEIR CLIENT RELATIONSHIPS.

With more than 35 years of experience, the professional staff at Kolinsky Wealth Management is dedicated to helping your clients plan for and meet their financial goals.

Kolinsky Wealth Management
Financial Guidance Since 1982

500 North Franklin Turnpike, Suite 104, Ramsey, NJ 07446
201-474-4011 MAIN 201-505-4879 FAX kolinskywealth.com info@kolinskywealth.com