

CJM Wealth Management Introduces Business Advisory Solutions Division

A new branch of CJM Wealth Management aims to help successful business owners significantly reduce their overhead expenses, taxes, and exposure to risk.

DEER PARK, NY, UNITED STATES, July 29, 2019 /EINPresswire.com/ -- CJM Wealth Management, an independent Registered Investment Advisory (RIA) firm located in Deer Park, N.Y., has launched its Business Advisory Solutions Division – a new branch of the wealth management firm that aims to help successful business owners significantly reduce their overhead expenses, taxes, and exposure to risk.



“Business owners are in the unique position to take advantage of money-saving opportunities that are not available to non-business owners. We recognize that both business owners and their tax planning specialists are so busy on a day-to-day basis that their planning can become reactive instead of proactive. The goal of our Business Advisory Solutions Division is to help our clients and their Certified Public Accountants (CPAs) provide a much more proactive approach,” said Peter Anastasian, Managing Director of CJM Wealth Management.

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CJM's four-step process begins with a proprietary Client Information Questionnaire (CIQ), which uses algorithms to help their team of experts efficiently identify and prioritize

opportunities within a business. This team-based approach and collaboration with a business owners current CPA, and other tax professionals, creates a comprehensive plan that addresses strategies to help improve cash flow and reduce risk.

“We want to distinguish ourselves from the typical wealth manager who may only be looking at investments as a solution. Our ongoing mission is to look well beyond investments to provide a solution that adds value to every one of our business owner clients. To help facilitate that mission, we have aligned with some of the country's top experts in various fields, including cost remediation, cost segregation, charitable planning, and advanced tax planning,” said Charles Massimo, founder and CEO of CJM Wealth Management.

“Our goal is to be the most successful and influential relationship our clients have. Developing this division goes a long way toward continuously reaching that goal,” Massimo stated.

ABOUT CJM WEALTH MANAGEMENT

CJM Wealth Management was founded in 2003 by CEO Charles Massimo, who had previously

spent nearly two decades at major financial firms. He became disillusioned by the difference between his employer's goals and those of his clients. With young triplets at home, two diagnosed at an early age with Autism, Charles took a huge leap of faith. He left Wall Street to pursue his vision: An advisory firm that puts clients before profits. Today, CJM manages nearly \$500M in assets, and while they work with various high net worth families, they have a strong concentration on serving the unique financial challenges and opportunities of affluent physicians, successful business owners, and families impacted by Autism.

For more information about CJM Wealth Management, visit www.cjmwealth.com, or contact 631.777.1030 or info@cjmwealth.com.

Kelley Muhseman
CJM Wealth Management
+1 631-777-1030

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