

Marvel Wealth Management Releases Guide on Finding a Wealth Manager

MELBOURNE, FLORIDA, UNITED STATES, October 25, 2021 /EINPresswire.com/ -- Marvel Wealth Management, an advisory in Melbourne, Florida, released a [new guide](#) explaining wealth management and providing tips on how individuals can choose a wealth manager.

The guide differentiates wealth management from general advising, explaining that this service is a niche offering for individuals with high net worth. Wealth managers typically have a background tailored to offering wealth management services, including experience in large volume portfolios, estate plans, tax strategies, and long-term wealth preservation.

While wealth managers help with a wide range of services, this type of professional often specializes in helping individuals set themselves up for a successful retirement, which can include exploring investment opportunities, income, and tax strategies and creating budgets.

The guide states the effectiveness of SMART goals, or goals that are:

- Smart
- Measurable
- Attainable
- Realistic
- Time-bound

It also stresses the importance of estate planning how setting affairs, which includes creating clear documentation of how assets will be split up after an individual passes.

When choosing a wealth manager, individuals should consider their lifestyle and financial goals as they stop. People can choose to work with a local wealth manager or seek virtual wealth management services.

The [Marvel Wealth Management guide](#) stresses the importance of screening for a wealth management team that abides by a fiduciary obligation, a type of legal responsibility that requires the wealth management to provide and communicate accurate, objective, and honest information and to always place the client's interests first.

Marvel Wealth Management Group is located in Melbourne, Florida, and uses LPL as its broker-

dealer. The group offers a wide range of services, including retirement plans, guided wealth portfolios, estate plans, 401k and 403b investing strategies, advisory accounts, and brokerage accounts.

Marvel Wealth Management works in the Space Coast and specializes in serving individuals who work in tech-based and aerospace industries. The group creates customized strategies based on each client's needs. Interested parties can learn more by visiting the [Marvel Wealth Management website](#).

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