

Lumora Wealth Expands Access to Financial Planning with Launch of Hourly Advice Model

Boutique RIA introduces flexible hourly advice to expand access to fee-only fiduciary planning for individuals and families at all stages of wealth.



Lumora Wealth

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2025 /EINPresswire.com/ -- Lumora Wealth, a Massachusetts-based fee-only fiduciary wealth management firm, announced the formal launch of its hourly financial planning service, reinforcing the firm's mission to provide transparent, accessible financial advice to individuals and families at every stage of wealth. The offering allows clients to engage Lumora Wealth's services without asset minimums, long-term commitments, or bundled investment products.

Led by founder and investment professional Mark Duffy, CFA, Lumora Wealth combines institutional investment experience with a boutique, values-driven approach to personal finance. The firm now offers hourly, project-based, and traditional assets under management (AUM) models—giving clients flexible entry points based on their needs.

"Financial planning shouldn't be limited to the ultra-wealthy," said Duffy. "Our hourly service reflects a commitment to democratizing access to professional advice. Whether someone is navigating a life transition, managing their own investments, or simply seeking clarity on a specific goal, we provide a structure that puts them in control."

The new hourly financial advice model responds to a gap in the advisory market. According to the 2023 Kitces Research Study on How Financial Planners Actually Do Financial Planning, only about 21% of financial advisors offer standalone financial planning without requiring portfolio management. Of those, hourly billing remains an even smaller subset, making Lumora's offering both forward-thinking and uniquely inclusive.

Key Benefits of Lumora Wealth's Hourly Financial Planning Service:

- No asset minimums or investment requirements
- Fee-only structure with no commissions or product sales
- Flexible, on-demand access to a credentialed fiduciary advisor
- Tailored support for life events such as divorce, inheritance, career shifts, and retirement planning

-Boutique client experience rooted in trust, discretion, and deep technical expertise

Lumora Wealth serves clients throughout the Boston area and beyond, with a strong focus on healthcare professionals, small business owners, and next-generation wealth builders seeking modern, conflict-free advice.

For more information, visit www.lumorawealth.com

About Lumora Wealth

Lumora Wealth is an independent, fee-only registered investment advisor (RIA) based in Melrose, Massachusetts. Founded by Mark Duffy, a CFA charterholder with over a decade of experience in institutional investing and financial strategy, the firm offers personalized wealth management, financial planning, and investment advisory services. Lumora Wealth is committed to financial transparency, fiduciary responsibility, and client-first service.

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Founder & Independent Advisor

Lumora Wealth

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Disclaimer: Lumora Wealth is a registered investment advisor in the Commonwealth of Massachusetts. This press release is for informational purposes only and does not constitute an offer to provide investment advisory services in any jurisdiction in which such offer would be unlawful.

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