



BetterWealth Expands Financial Services to Help Clients Live Intentionally Through Wealth Planning

NY, UNITED STATES, September 2, 2025 /EINPresswire.com/ -- BetterWealth, a financial services company dedicated to helping people live more intentionally with their money, today announced the expansion of its holistic planning services, including [life insurance strategies](#), tax optimization, estate planning, retirement planning, and risk management.

At the center of BetterWealth's approach is The And Asset[®], an overfunded life insurance strategy designed to provide both living and legacy benefits. Unlike traditional policies, The And Asset[®] is structured to maximize early cash value growth, flexibility, and long-term protection—allowing individuals to grow wealth while also safeguarding their families and businesses.

BetterWealth's mission is to replace financial confusion with clarity, empowering clients to take control of their future. Its planning framework focuses on five key areas:

Life Insurance Strategies – including The And Asset[®] for cash value growth and protection.

[Tax Planning](#) – helping clients keep more of what they earn through efficient structures.

Estate Planning – ensuring family and business legacies are secure.

Retirement Planning – creating intentional plans for long-term confidence.

Insurance Services – protecting wealth from unforeseen risks.

"Most people are overwhelmed by financial jargon and short-term thinking," said James of BetterWealth. "Our role is to simplify wealth strategies, provide clarity, and help clients live intentionally—where money becomes a tool for freedom and purpose."

By focusing on education and transparency, BetterWealth serves entrepreneurs, professionals, families, and investors who want a more intentional approach to wealth.

About BetterWealth

BetterWealth is a financial services company dedicated to helping people live intentionally by

bettering their finances. Offering life insurance strategies, tax planning, estate planning, retirement planning, and insurance services, the company is best known for The And Asset®, an overfunded life insurance strategy that provides both living benefits and long-term protection. Through clarity, transparency, and intentional planning, BetterWealth empowers clients to grow, protect, and use their wealth with confidence.

Sam Preston

Unlimited Content

+44 7799 180194

[email us here](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/845288782>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.