

CONNECTICUT WOMEN IN BUSINESS

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Because Trust Matters

Valenti Wealth Management Offers Unbiased Advice and Unparalleled Personal Service

Twenty-nine years ago, as a young financial consultant just starting out, Joan Valenti, CFP® made a promise to herself. She vowed she would never recommend an investment or another financial solution she would not make herself if she were in the client's shoes.

Valenti has come a long way since those early days. She has built a highly successful wealth management and financial planning practice through hard work and talent, earning the prestigious CERTIFIED FINANCIAL PLANNER™ practitioner designation along the way. And she and her team have formed close, long-term relationships with many clients.

But the pledge she made at the start of her career still guides every decision and recommendation, every client relationship. "Valenti Wealth Management was founded on the principles of integrity, independence and transparency, and those values are still paramount today," she says. "Trust still matters at Valenti Wealth Management."

Comprehensive Financial Planning for Retirees and Pre-retirees

Valenti Wealth Management develops comprehensive financial strategies, including retirement and estate planning, tax strategies and risk management (insurance), for individuals and families, businesses and nonprofit organizations. It is dedicated to providing unbiased advice and unparalleled personal service.

While the firm works with clients of all ages, it specializes in helping clients pursue their retirement goals and distribute their assets in a tax-efficient manner, with a focus on accumulating wealth and preserving it from generation to generation. As an independent, fee-based firm, Valenti Wealth Management

provides unbiased advice, with clients' best interests always paramount. It offers securities and insurance products through LPL Financial, the nation's largest independent broker-dealer*, and does not offer any proprietary products. All recommendations are designed with the client's needs, time horizon, investment objectives and risk tolerance in mind.



Joan Valenti

In-Depth Analysis

The process begins with a thorough review of the client's financial situation, including income needs, taxes, investments and insurance. The firm uses specialized financial planning software to conduct an in-depth analysis.

"We take the time to understand each client's personal, professional and life goals, and to gather pertinent information and financial statements," Valenti says. "We listen carefully to the client's

needs, identify the best options for their unique circumstances, and guide them along the path to financial well-being."

The firm takes responsibility for ensuring the proper allocation of the client's assets and for managing both pre- and post-retirement cash flow. It also coordinates the services of other professionals, as needed, to help implement the overall financial plan. The asset allocation model is reviewed quarterly and repositioned or rebalanced as needed to reflect the client's evolving lifestyle and any changes in the markets or the economy. Valenti and her staff communicate with clients regularly to gauge their progress and ensure their needs and expectations are on track to being met.

"Today, more than ever, many people are wondering who they can trust to manage their money with integrity," Valenti says. "Some are even questioning who their financial consultant really works for. At Valenti Wealth Management, we work strictly for you, and we promise to do everything in our power to help you achieve financial success on your terms." Clients always come first at Valenti Wealth Management.



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