OUR COMMITMENT

It is our commitment to help provide comprehensive wealth management services to our clients. In order to do this effectively, we first determine their personal financial needs and subsequently identify and create a customized wealth management strategy that will help them meet their goals.

With combined experience of over twenty five years, we believe our team has a reputation for integrity, trust, and superior service. We build relationships that last a lifetime, and by becoming our clients’ financial advisor, we believe we can help them find solutions to life’s financial complexities in addition to helping manage their portfolios.

We conduct business in an intelligent, ethical, proactive, and service-oriented manner. Each client relationship is built upon our principle to pay prudent attention to every detail. We want our clients to rest easy; they will hear from us in both good and difficult times.

We believe that our clients’ trust and confidence must be continuously earned.

OURS PROCESS

In order to provide clients with knowledgeable and meaningful advice, we take a four-step approach, forming a relationship with our clients using the following steps:

Step One: Getting to Know You

The entire planning process starts with you, the client. It is only after we understand not just your financial needs but also your life goals, that we can offer you the right guidance to help you achieve your vision for the future. We take the time to listen and to ask questions that can uncover your needs. Building a successful relationship helps to ensure that critical areas effectively dovetail with our clients’ overall wealth management strategy.

Step Two: Developing a Plan

In addition to providing each client with the framework for a long-term plan, we identify the appropriate tools via an open architecture platform which we use to implement the financial strategies discussed. We have extensive experience working in the areas of investment management, asset allocation, retirement planning, estate planning, and insurance.

Step Three: Implement Solutions

Through our bespoke planning process, we work with each client to help ensure that the plan implements a solution aimed at reaching their financial goals.

Step Four: Ongoing Review

Planning is a journey, not a single event. Clients view us as financial advisors who help them stay on track to meet their financial goals. Because investing is a long term process and not a series of transactions, developing a custom plan is only one element of our relationship. The longevity of the planning process is characterized by monitoring and discussing the progression, exploring new ideas and adjusting the plan when necessary.

Please see important disclosures at the end.
Edward R. Wentzheimer, CRPC®
Senior Vice President | Financial Advisor | Senior Investment Management Consultant

Ed assists with all aspects of an individual’s financial picture by delivering comprehensive wealth management strategies tailored to each client relationship. He helps develop, implement and monitor customized portfolios and financial plans for high-net-worth individuals, business owners, retirees and corporate executives. By possessing the knowledge and experience essential to educating clients about their portfolios, Ed will help identify strategies and develop financial plans according to their individual goals and objectives. He has worked for two of the most preeminent investment firms in the world having started his career at UBS financial Services, Inc, in 2002 and then moving to Morgan Stanley in 2010.

His focus is in complex retirement planning and tactical fixed-income. He holds his Series 7, series 66 licenses as well as his Life Insurance license.

Ed is a member of the prestigious Century Club of Morgan Stanley for 2011 through 2013. He has also been awarded the title “Senior Investment Management Consultant”. Ed achieved the designation of Certified Retirement Planning Counselor SM (CRPC®) from the College of Financial Planning. He earned his Bachelor of Arts degree from University of Oklahoma where he was a captain of the men’s top ranked gymnastics team while on athletic scholarship.

On a personal note, Ed co-founded a non-profit organization in 2010 called Hoboken Volunteers. The organization raises money through organized volunteer work that is then redistributed to other local non-profits that are in financial need usually benefiting children in the community. He currently serves as the Finance Director and a member of the Board of Directors. Ed, along with his wife and two children live in Hoboken, NJ where they are very active in their community.

Michael A. Valenza
Financial Advisor

Mike’s areas of focus are in new business development and client relationship management. Mike’s technical skills are specifically impactful to the team through educating clients in the areas of asset management, insurance & annuity reviews and access to lending services. As it relates to investment management Mike has a particular affinity to providing retirees with guidance in investments that seek to generate streams of income during retirement years.

Prior to joining Morgan Stanley in 2011 Mike worked at Prudential Financial for 9 years in various roles within their Group Insurance division. As a sales representative Mike provided employers and employees with insurance coverage as part of their employee benefits. He primarily worked with companies in the Northeast with 25 to 1,000 employees.

Mike holds his series 7 & 66 licenses as well as his Life & Health Insurance licenses. Mike earned his Bachelor of Science in Business Administration from The College of New Jersey. He is a resident of Cranford, NJ where he and his wife are active in raising their 3 children.

Amanda Ricchiuti
Registered Service Associate

Amanda comes to The Wentzheimer Group from Albany, NY where she previously resided and spent two years at RBC Wealth Management as a Registered Client Associate. She is a graduate of SUNY Albany, with a BS in Financial Market Regulation.

Amanda holds the Series 7 and 66 licenses and enjoys servicing clients on a daily basis with all operational and administrative requests. Amanda recently moved to New York City and spends her free time with friends and family exploring the city and doing outdoor activities.
Legal Disclosures

The investments listed may not be suitable for all investors. Morgan Stanley Smith Barney LLC recommends that investors independently evaluate particular investments, and encourages investors to seek the advice of a financial advisor. The appropriateness of a particular investment will depend upon an investor’s individual circumstances and objectives.

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