Cherry Tree
WEALTH MANAGEMENT

WHO WE SERVE

What Clients and Prospects are a Good Fit For Our Services?

ABOUT CHERRY TREE WEALTH

Cherry Tree Wealth Management, LLC (CTW) is a fee-only fiduciary advisory firm. Our professional and experienced advisors specialize in investment management coupled with holistic financial planning to align our client's personal interests with their financial assets. We place clients at the forefront to understand their current situation and address the financial demands of today along with the increasing changes of tomorrow.

CTW is an SEC registered investment advisor and fiduciary advisory firm that designs personalized low-cost portfolios based on our clients current situation, resulting in a proprietary "One-Page Financial Plan." We employ a team of professionals and experienced advisors, most of whom have professional designations such as Chartered Financial Analyst (CFA) or Certified Financial Planner (CFP).

Getting you there.
In life and legacy.

"Aligning financial assets with personal goals."

www.cherrytreewealth.com

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It all starts with a conversation. We make time to get to know your unique story by looking at the whole picture. Where you are, what you want to achieve and how Cherry Tree Wealth Management (CTW) can help you get there in life and legacy.

- Retirees and pre-retirees who are 5-10 years from retirement.
- Savers. They live within or below their means. People who have worked hard and built their wealth over time, and are grateful for what they have. People who give back.
- Delegators. People who want to delegate their finances and investments to a professional so they can spend their time on other things they enjoy such as their job, families, hobbies, etc.
- People who value and appreciate our help with financial planning, retirement planning, tax planning, estate planning, charitable giving planning, etc. Clients who are just looking for asset management only are not getting the full benefit of our services.
- People who believe in our investment philosophy of long-term focus, diversified global portfolios, and the use of diversified low-cost tax-efficient index-based investments. Investors who are looking for exciting individual stock pick stories, market timing, risky investments, lots of trading, or complicated expensive products like hedge funds or private equity are not a good fit.
- We have many clients who are doctors, business owners, and families rooted in the communities where they work and live.
- People who are nice, who ask questions, are engaged with our team, and appreciate our help.
- Our minimum new account size is $500,000. Our target clients have over $1 million in assets with us, and in nearly all cases have all their investment accounts managed by our team.