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Trusting Wealth Trust Arizona

A Financial Planning Firm of a Different Sort

“**W**e specialize in helping higher net-worth clients integrate management of their portfolio with the management of their estate. We don’t just manage money, we look at their whole financial picture, their business, their family, their retirement and their real estate, to achieve the goals they want to meet financially,” says Jeff Krueg, CEO of Wealth Trust Arizona, a financial planning firm that pioneered the concept of integrating estate and financial planning in Arizona.

The firm specializes in portfolio management, estate planning, asset and lifestyle protection, and taxation issues. This includes asset allocation, retirement planning, educational planning, charitable giving and equity diversification strategies, hedging and monetization strategies, trusts and trustee selection, estate and trust administration, business succession planning, and more.

Formerly known as DeGreen Wealth Management, Bloomberg has ranked Wealth Trust Arizona as one of the top 200 financial firms in America. And Registered Rep.

Magazine, an industry publication, ranked them as one of the top 50 advisors in America and the only one in Arizona.

The firm joined Wealth Trust LLC, a Nashville, Tenn.-based financial advisory firm, only recently, becoming one of 10 affiliated investment firms that collectively manage around \$6.4 billion in assets. “The advantages of being af-



filiated with Wealth Trust LLC are that we now have access to hedge funds, which are not usually available to the average investor, as well as to a lot of private type of investments.” says Krueg. “Also the fact that we now have other offices across the country for our clients’ convenience is important to us because we service a lot of high net-worth

investors.”

“An additional factor that makes us different from other firms is that we have assembled an in-house team of pros that include financial planners, MBAs and attorneys. This is not the case with most firms, where clients have to deal separately with the attorney and tax planner. In our firm, all of these people work together as a team,” adds Paul Ahearn, a certified financial planner and the firm’s senior vice president.

Wealth Trust Arizona’s asset management is based on the Nobel Prize winning Modern Portfolio Theory, in which the firm considers all aspects of an individual’s financial situation, including the client’s liquidity needs, his time horizon, tax issues, return expectations, risk tolerance and asset constraints. After the initial consultation, they will prepare an investment policy outlining their recommendations. In-

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vestments are not limited to equities but also provide for alternative investment strategies such as real estate, managed futures and private ventures. Once investment strategies are implemented, the firm’s professionals will review them with their client, and monitor and revise them as needed.

When it comes to estate planning, Wealth Trust Arizona has partnered with attorneys at Colby & Thomas, PLLC, who

make sure that all the client’s assets are titled properly, that estate documents reflect changes in the law, that assets are adequately protected against frivolous lawsuits, and that estate and gift taxes are minimized to the greatest extent possible.

The firm’s asset and life protection segment consists of shielding the client’s assets from serious risks and losses. This means the firm’s financial advisors make sure that the client’s as-

sets are protected with life, disability, health and long term care insurance.

Last but not least is the matter of taxes. The firm’s affiliated CPAs will find ethical, appropriate solutions to minimize their clients’ tax bill. They will help them defer or reduce taxes on the sale of their real estate with appropriate titling and trust techniques, make use of irrevocable trusts to leverage their testamentary gifts, lower their estate and income taxes and provide a lasting legacy.

Ahern explains that Arizona is a good state to live in for estate planning, since it is a community property state. “This means that there are valuable income tax considerations that come with passing away, which is a valuable factor for families who have highly appreciated assets.”

“What’s more, our team focuses on building relationships that are more than just client and customer,” says Krueg. “We develop true partnerships with our clients and their families.”

—Lydia Enderle Bell