Wealth Management

Your Financial Language...Translated.

Introducing emc Wealth Management

emc has partnered with Stonebridge Financial Group to offer wealth management services tailored to your needs and relentless in pursuit of your goals.

For Individuals	For Retirement Plans
INVESTMENT ADVICE Recommendations and periodic reviews of your portfolio	**PLAN DESIGN** Selecting appropriate provisions and assisting with administrative setup
TAX-EFFICIENT FINANCIAL PLANNING Your accountant and financial advisor under one roof, working in lockstep as your circumstances evolve	**INVESTMENT SELECTION AND MONITORING** Developing a diverse lineup of funds and periodically evaluating their performance to determine if changes are needed
RETIREMENT PLANNING Ensuring your income and assets remain sufficient to achieve spending and giving goals	**ANNUAL FEE BENCHMARKING** Examination of fees charged by third party service providers to determine if costs can be reduced
PORTFOLIO MANAGEMENT AND REBALANCING Ensuring your portfolio remains in line with the allocation we established together	**EMPLOYEE ENROLLMENT AND EDUCATION** On-site or virtual meetings to assist your employees with enrollment and field their questions

Schedule a complimentary consultation by contacting Noah Leftridge:
nleftridge@emcwealthmgmt.com - 717.650.6225 ext. 230

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Corporate Retirement Plans

- How much do I need to save for retirement?
- How should I allocate my retirement savings?
- I am approaching retirement and need help developing a comprehensive financial review.
- I have a prior retirement plan or IRA and need help rolling it over.
- I have general questions about my financial situation.

Noah Leftridge
Investment Advisor Representative

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