Kolinsky Wealth Management, LLC.
Financial Guidance Since 1982

THE POWER OF PARTNERSHIP

Strategies for Success

AS A TRUSTED ADVISOR, YOUR CLIENTS OFTEN LOOK TO YOU FOR RECOMMENDATIONS AND...

Kolinsky Wealth Management helps you to leverage the relationships that you have built, by expanding the range of financial services and solutions that you offer to clients, while maintaining your independence and objectivity.

We are committed to forming professional alliances that provide our partner firms access to a high level of expertise in the implementation of investment strategies, risk management, retirement plan designs and estate planning.

Kolinsky Wealth Management is committed to the highest standards of professionalism. We serve clients with creative, comprehensive solutions that are designed to match their specific needs.

As your Professional Partner, we are uniquely positioned to offer a key alliance that gives you a competitive advantage in supporting your individual and corporate clients. [1.]

A COMPREHENSIVE RANGE OF RESOURCES AND CAPABILITIES

Wealth Management

› Accumulation
› Preservation
› Distribution

Investment Advisory Services

› Asset Allocation Modeling
› Institutional Asset Management
› Fixed Income Strategies
› Alternative Investments
› Mutual Fund and ETF Portfolio Solutions
› Ongoing Monitoring and Comprehensive Reporting

Estate Planning/Wealth Transfer

› Tax-Efficient Wealth Transfer
› Estate Liquidity Needs
› Estate Tax Reduction Strategies
› Gift Leveraging

Risk Planning Strategies

› Income Protection Planning
› Life insurance
› Long-term Care Insurance
› Disability Insurance

Retirement Plan Design and Consulting

› Profit Sharing, 401(k), Defined Benefit Plans
› Combination/Hybrid Plans
› Fee Benchmarking and Vendor Search
› Full Actuary and Plan Document Services

Business Planning Strategies

› Executive Benefits
› Buy-Sell Agreements
› Key Man Insurance
› Corporate-Owned Life Insurance

[1.] State life insurance license required for sharing insurance commissions.

Kolinsky & Associates founded by Steven Kolinsky

1982

Kolinsky Financial Group Inc. was acquired by a company that went public on the NYSE in 2003

1999

Steven Kolinsky becomes Board member of a national producer group

2003

...FINANCIAL IDEAS BEYOND THE SCOPE OF YOUR SPECIFIC AREA OF EXPERTISE.

An Enhanced Scope of Service and Support

Kolinsky Wealth Management has a vested interest and professional commitment to support your client relationships with a full range of financial solutions offered by many of the leading financial institutions in the world.

Because we are independent, we are not locked into singular relationships with any financial institutions, and are free to do what's best for your client.

Most importantly, your participation and guidance are key parts of this process. We work together to make sure your clients' needs are met through our combined energies, talents and resources.

A Strategic Alliance Built to Strengthen Your Client Relationships

Kolinsky Wealth Management works hard to demonstrate value-added service to your clients. In keeping with this philosophy, we are obligated by professional commitment to uphold stringent professional standards for working with partner firms.

This includes a sharp focus on:
Confidentiality of all your client files
Clear client disclosures
Competency and a high level of expertise
Objectivity, due to no quotas or proprietary products

Partner With Us

What separates our firm from other organizations is our commitment to providing solutions, not just financial products. We don't have "programs." We develop and implement individual solutions that are designed to match your clients' needs and lifestyles.

For more information or to schedule an appointment, please contact us at (201) 474-4011 or via email at info@kolinskywealth.com.

KOLINSKY WEALTH MANAGEMENT IS DEDICATED TO HELPING OUR PARTNER FIRMS DEEPEN THEIR CLIENT RELATIONSHIPS.

Privatization of Kolinsky Wealth Management, LLC

2008

Company name changed to Kolinsky Wealth Management, LLC, an SEC Registered Investment Advisor

2010

After 30 years, Kolinsky Wealth Management, LLC continues to look to the future, building on the success of its clients

2012

Leveraging 30 years of experience, the professional staff at Kolinsky Wealth Management is dedicated to helping your clients plan for and meet their financial goals.

KolinskyWealthManagement,LLC.

Financial Guidance Since 1982

50 Tice Boulevard, Atrium Level, Woodcliff Lake, NJ 07677 (201) 474-4011 MAIN info@kolinskywealth.com kolinskywealth.com