Personalized Wealth Management

Solutions for every stage of life, provided by one collaborative team under one trusted brand.

Aprio
Wealth Management

Account for Anything™

Built on trust, backed by strength, designed to account for anything™

At Aprio Wealth Management, our mission is to empower high-net-worth individuals, business owners, and families with seamless, personalized contextual advice that integrates financial planning, investment management, and tax efficiency. We partner with you to manage, protect, and grow your entire financial life so that your wealth works for you today, and leaves an enduring legacy tomorrow.

We have a national footprint and leverage the resources and private equity-backed strength of Aprio. Building on the existing trusted relationship with your Aprio tax advisor, we don't just manage money. We orchestrate your entire financial life so that you can live with purpose and leave a lasting impact.

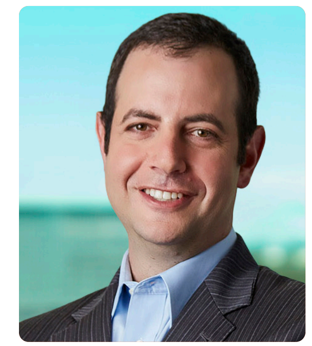
#24 ACCOUNTING FIRM IN THE NATION*

$5B+ ASSETS UNDER MANAGEMENT

*2025 Accounting Today Top 100 Firms

Meet the Aprio Wealth Management Leadership Team

Led by seasoned wealth management professionals, the Aprio Wealth Management team includes over 40 employees nationwide including 20 CFP®s and 5 CFAs.



Keith Greenwald
CHIEF EXECUTIVE OFFICER, PARTNER

Noah Marell, CFP®
CHIEF OPERATING OFFICER

Simeon Wallis, CFA
CHIEF INVESTMENT OFFICER, PARTNER

Eric Flynn, CFA, CPA
CHIEF WEALTH OFFICER

Jandy Rowe
DIRECTOR, CLIENT SERVICES OPERATIONS & INTEGRATIONS

Erin O'Connor-Bell, CFP®
DIRECTOR, FINANCIAL PLANNING & CLIENT EXPERIENCE

Dan Wilson
DIRECTOR, CORPORATE DEVELOPMENT

One team, contextual advice and exceptional service

Every piece of your financial life is connected. So, your wealth management strategy should take all of those pieces into consideration. That's why we offer a comprehensive, coordinated approach to wealth management that brings together financial planning, investment management, tax strategy, estate planning, business optimization, and risk management solutions all in one place.

You will have a dedicated team that works in collaboration with you to ensure every decision is aligned with your unique values and goals. This unified, proactive approach means that your financial opportunities are identified and executed seamlessly with greater efficiency and fewer surprises.

Comprehensive financial planning

We believe that frequent, ongoing financial planning is the best way to account for anything™ that may impact your wealth, including market conditions, tax legislation, family transitions, and philanthropic goals. We work closely with you and your family to make sure every element of your financial landscape is aligned with your unique values and goals. All of this is captured in a personalized holistic roadmap that we proactively navigate together. Advanced planning technology and AI-driven analytics help us monitor progress and provide data-driven insights and value-based advice to make course corrections as life changes.

The result is not just a plan, but a partnership designed to endure across generations.

Investing with purpose

Your investment strategy should reflect you – your goals, your values, your risk comfort – and be as intentional as your financial plan. At Aprio Wealth Management, we deliver a fully integrated investment experience that combines institutional-level sophistication with the customization and flexibility expected by discerning investors.

With an average of 25 years of industry experience per member, our principled investment committee leads a rigorous approach that is academically minded, low-cost, globally diversified, highly disciplined, and tax efficient. Our portfolios are constructed using an open architecture multi-pillar approach customized to each client's situation. We leverage the full spectrum of the public and private markets to identify investment opportunities available to sophisticated investors, including:

- Globally diversified exchange-traded funds (ETFs)
- Direct indexing strategies
- Private Equity
- Private Credit
- Real Estate
- Custom portfolio construction & in-house trading

Our investment management team delivers more than strong execution, they deliver confidence.

Tax planning and coordination to deliver "more"

Integrated tax planning can be one of the most significant drivers of long-term financial success. We minimize tax exposure and maximize after-tax wealth through the thoughtful coordination of investments, income strategies and estate considerations. Our integrated tax strategy ensures every piece of your financial landscape - investments, retirement accounts, trusts, business, and philanthropic goals – work in concert rather than in isolation.

Aprio Wealth Management's customized portfolio construction emphasizes the importance of asset allocation, tax-loss harvesting, and capital gains exposure. This disciplined approach, along with tax diversification strategies, gives you strategic control over future distributions.

Creating and implementing forward-looking strategies is easy and convenient when all your advisors are in-house. Your Aprio Wealth Management team works alongside your Aprio tax professionals to collaborate with you, your family, and business partners continuously throughout the year to minimize your tax burden and align your plan for optimal tax outcomes.

Holistic trust and estate planning

We believe that wealth management should encompass the thoughtful integration of financial strategy, estate planning, and intergenerational continuity. Our in-house estate planning capabilities and proactive coordination with Aprio Legal deliver a level of precision and cohesion that distinguishes our approach.

We help you structure your estate to reflect your values, ensure seamless transfer of wealth, and minimize taxes to safeguard your legacy. As markets, laws, or family circumstances evolve, our coordinated structure allows for timely adjustments across all aspects of your financial strategy.

This integrated estate planning and coordination framework provides a forward-looking approach to managing complex wealth and estates. The result is greater clarity and confidence that every element of your financial life is working to shape your legacy with intention.

Risk management and insurance

True wealth management isn't just about accumulating assets, it is also about protecting your family, your lifestyle, and your legacy against the unexpected. This is why Aprio Wealth Management offers risk management and insurance advisory services as a core component of your financial strategy.

Through risk management and insurance planning we identify vulnerabilities and coordinate coverage options for life, disability, long-term care, and liability policies to ensure your financial plan is resilient against potential risks.

We provide fiduciary advice focused solely on what serves best to protect you and your family's goals. We can assist you with implementation utilizing your existing providers or our trusted partners.

Business owner solutions

At Aprio Wealth Management, we recognize that for many of our clients, their business is not only their primary source of wealth but also a central expression of their life's work. Our integrated business planning capability is designed to support that enterprise at every stage of its evolution, ensuring that both personal and corporate wealth strategies remain aligned.

Your advisory team will provide industry-specific insight and strategic support through each phase of the business life cycle. Retirement plan services, valuation expertise, succession and exit planning, are all seamlessly integrated with your investment management, estate planning, and tax strategy to ensure that your life's work continues to create lasting value for you, your family, and future generations.

Disclosures

Investment Advisory services are offered through Aprio Wealth Management, LLC, an independent Securities and Exchange Commission Registered Investment Advisor. Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any securities, and past performance is not indicative of future results. Investments involve risk and are not guaranteed. Be sure to first consult with a qualified financial adviser and/or tax professional before implementing any strategy discussed here.

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Since 1952, successful individuals, entrepreneurs, and families around the world have trusted Aprio to help them account for anything. With the founding of Aprio Wealth Management in 1999, our growing team of trusted advisors continues to build on that legacy, offering personalized guidance and services that evolve with you.

wealth.aprio.com