

# THE POWER OF PARTNERSHIP



*Important Strategies for Success*

# THE POWER OF PARTNERSHIP

As a trusted advisor, your clients often look to you for recommendations and referrals beyond the scope of your specific area of expertise.

**Kolinsky Wealth Management** can help 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.



## 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

- Life Insurance
- Income Protection
- 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

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

## 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.



*The professional staff of  
Kolinsky Wealth Management is  
dedicated to helping our partner firms  
broaden their sphere of influence  
with their clients.*

## 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](mailto:info@kolinskywealth.com).



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Kolinsky Wealth Management, LLC  
50 Tice Boulevard, Atrium Level  
Woodcliff Lake, NJ 07677  
(800) 662-6817    (201) 474-4011  
[www.kolinskywealth.com](http://www.kolinskywealth.com)  
[info@kolinskywealth.com](mailto:info@kolinskywealth.com)

Advisory Services offered through Kolinsky Wealth Management, LLC, an independent Registered Investment Advisor,

Securities offered through Allied Beacon Partners, Member FINRA, SIPC; 7501 Boulders View Dr., Suite 601, Richmond, VA 23225 (888) 720-4872  
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