



Wealth Management Services

Saving, investing, budgeting and managing unknown financial situations is critical for individuals active in the workforce or those enjoying retirement. MS Investment Partners provides financial planning and wealth management services to clients of MSPC and others seeking to invest in their future. By combining our expertise in tax planning with the resources available to us through our affiliation with 1st Global Capital Corp., we are able to offer complete professional financial services and consulting.

Like all of our services, our hands-on approach is designed to guide you through the process while providing you with education and information to help you better understand your options and make informed decisions.

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Whether you are at the beginning of your career looking for an investment strategy, planning for your children's education, or are closer to retirement than you were yesterday, our team will work with you to develop a financial strategy that aligns with your personal and professional and financial goals.

Our Wealth Management Services Include:

- Business Planning
- Debt Management
- Education Planning
- Income Protection and Asset Preservation
- Life Insurance
- Long-term Insurance
- Investment Planning
- Retirement Planning and 401K Design
- Tax and Estate Planning
- Trusts



MS
Investment Partners

MSPC offers Wealth Management Service through its Financial Services arm, MS Investment Partners, LLC, an autonomous entity established solely to provide such services to MSPC clients.

MSPC Certified Public Accountants and Advisors, P.C. was formed on a foundation of client service, technical expertise, and trust. We offer a full range of accounting and auditing, tax, advisory and technology consulting services including accounting software systems and ERP solutions.

MSPC
Certified Public
Accountants and Advisors, P.C.

STRUCTURE . SUPPORT . SOLUTIONS .

Our Process



Meet

Our initial meeting covers our services to make sure we are a good fit for your needs.



Vision

We will listen to your goals for today and the future and understand what factors are most important to you when it comes to investing.



Plan

A customized plan based on your vision will be created based on our experience and research-backed investment options.



Execute

Once you approve our plan, we will walk you through the paperwork and implementation.



Monitor

We monitor your progress and arrange ongoing meetings to make sure your goals are the same and adjust as needed to maximize your financial position.

Looking for wealth management services?

Contact us to find out how MSPC and MS Investment Partners can help you plan your financial future.

Contact Patrick Trombetta at ptrombetta@mspc-cpa.com

*Securities offered through 1st Global Capital Corp. Member FINRA (www.finra.org), SIPC (www.sipc.org).
Investment Advisory Services offered through 1st Global Advisors, Inc.*

*This is not an offer to sell securities in any other state or jurisdiction. Insurance services offered through
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