Get the attention you deserve at Chatham Wealth Management

Chatham At A Glance

Who We Are:

We work closely with a select group of clients who want fully customized, fiduciary advice and portfolio management from a team of accessible financial experts.

What Sets Us Apart:

You don't just feel important, you are important.

At CWM, every client is important and is treated as such. We are a team of investment portfolio management professionals with more than 35 years of experience who offer planning for the future, protection for your wealth, and a personal touch to every client interaction.

Customization is at the core of our approach.

Let the team at CWM do the valuable research to keep on top of the markets and any required changes to your portfolio. We deliver comprehensive and customized investment solutions with no models, dictated by our detailed goals-based financial planning.

At the heart of every decision is YOU.

With large firms, it's easy to feel anonymous in a sea of thousands of clients. We are high-touch, fee-only fiduciaries with years of experience in fixed-income equities, securities, and investment services. We communicate with our clients directly and often, so that we stay on the same page and prosper together.

Chatham Wealth Management

What We Offer:

- Financial Planning
- Wealth Management
- Retirement Planning
- Estate Planning
- Investment Management
- College Planning
- Tax Planning
- Insurance Analysis
- Risk Management
- Charitable Planning

How We Work:

You probably have time to be an investor. You might have time to be well-informed. You seldom have time to be both.

1. PLANNING for the future
When it comes to planning for the future, Chatham Wealth Management works with you to address many possibilities and eventualities that ma come your way.

2. PROTECTION of your wealth
Our experienced financial experts work toward not only growing your portfolio's worth, but also protecting the wealth you already have.

3. PERSONAL touch for every client
At the heart of Chatham Wealth Management's client experience is our goal to give every client the attention they deserve. This includes unique financial considerations beyond pure investment management.

Disclosures

- Chatham Wealth Management is registered as an investment adviser with the SEC. SEC registration does not constitute an endorsement of the firm by the Commission, nor does it indicate that the adviser has attained a particular level of skill or ability.
- Past performance may not be indicative of future results. All investment strategies have the potential for profit or loss. Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment or strategy will be profitable for a client's portfolio.

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