



# WAHBY

FINANCIAL GROUP, LLC  
*helping build wealth for life*

## MAKE A PLAN – AND STICK TO IT

Today's economic environment can be unsettling. That is why we work with clients to build a holistic plan, with volatility in mind, so you can stay focused on your goals and ignore the external noise.

## OUR APPROACH

### A Planning-first Approach - Tailored to You

At Wahby Financial Group, financial planning is not a one-time event. It's an ongoing process that evolves as your life, priorities, and circumstances change.

Our approach begins with understanding what matters most to you — then aligning every financial decision to support those goals.

### Our Process Includes:

- Deep discovery to understand your goals, values, and concerns
- A comprehensive financial plan that connects all aspects of your financial life
- Investment strategies aligned with your time horizon and risk tolerance
- Ongoing review and guidance as markets, tax laws, and life evolve

***The result is a plan you understand — and confidence in the decisions you're making.***

## CLIENT SERVICES

01

### Wealth Management & Investment Strategy

Effective investing isn't about chasing returns — it's about aligning your portfolio with your goals, time horizon, and risk tolerance. We help you:

- Build an investment strategy aligned with your long-term objectives
- Manage risk thoughtfully across market cycles
- Integrate investments with your broader financial plan
- Maintain discipline during periods of market uncertainty
- Adjust your strategy as goals, cash flow, and life evolve





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02

## Retirement Planning

Retirement isn't a single event — it's a multi-decade phase of life that requires careful coordination.

We help you:

- Understand when you can retire and what it will take to get there
- Create sustainable income strategies for retirement
- Plan for healthcare, longevity, and lifestyle considerations
- Adjust your plan as markets and life evolve

03

## Estate and Legacy Planning

A thoughtful estate plan ensures your wealth reflects your values and supports the people and causes you care about most. We help you:

- Clarify your legacy goals and family priorities
- Coordinate estate strategies with your broader financial plan
- Work alongside legal and tax professionals to implement your plan
- Prepare heirs for responsible stewardship of wealth

04

## Philanthropic & Charitable Planning

Giving thoughtfully allows you to create impact while aligning charitable goals with your overall financial strategy. We help you:

- Clarify philanthropic goals and priorities
- Explore tax-efficient giving strategies
- Integrate charitable planning into your long-term plan
- Structure giving for both immediate and lasting impact
- Coordinate with estate and legacy planning objectives

**Let's start a conversation.**

**Contact us to schedule an appointment.**

**904-372-9997**

**Visit us online  
[www.wahbyfinancial.com](http://www.wahbyfinancial.com)**

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