

The home of personalized

Wealth Management Services

For over 30 years,
Spectrum has
helped clients
across the country
achieve their ideal
vision of financial
success.



Bring Your Financial Vision Into FOCUS

Spectrum asset management provides a full complement of financial services to successful individuals and business owners. We provide our perspective and strategies to help our clients build wealth, transfer assets and values across generations, reduce taxes, and invest in ways which align with their values.

We work with clients in all stages of their lives and professional journeys, but we especially focus on helping navigate some of life's most challenging transitions. This includes retirement, business transfers, inheritance events and moving forward after the death of a spouse. In times of transition and uncertainty, we help you move forward with clarity and confidence.



How Well Does Your Advisor Understand You?


We care about our clients, both personally and financially, and we know there is no such thing as a one-size-fits-all financial plan. That's why our client relationships always start with understanding your values, personality, life situation and goals. Armed with this knowledge, we create a custom financial roadmap built around what matters most to you.

Here are a few of the tools we use to accomplish this:



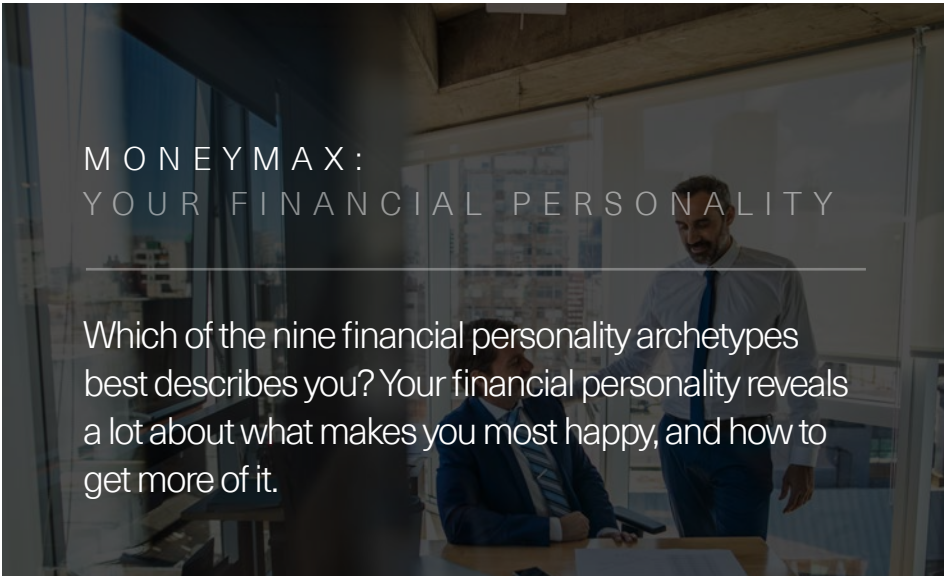
KOLBE A INDEX: YOUR INSTINCTIVE STRENGTHS

Provides insight into your ideal communication and action style, so we can tailor our services to be as easy, enjoyable and fruitful as possible for you.



VALUE STAIRCASE

Gain absolute clarity on what is most important to you in life. Build a financial plan that supports that vision.



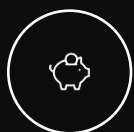
MONEYMAX: YOUR FINANCIAL PERSONALITY

Which of the nine financial personality archetypes best describes you? Your financial personality reveals a lot about what makes you most happy, and how to get more of it.

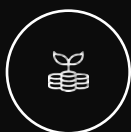
SPECTRUM | SERVICES

A Full Range of Services

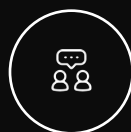
Spectrum offers a full range of financial services. We serve as the central hub for our clients' financial lives, helping them interpret and coordinate all of the separate components into one coherent strategy that supports their goals and life vision.



FINANCIAL
PLANNING



INVESTMENT
MANAGEMENT



INVESTMENT
CONSULTING



PORTFOLIO
MANAGEMENT



BASIC &
ADVANCED
ESTATE
PLANNING



TAX
PLANNING



ADVANCED
INSURANCE
DESIGN &
PLACEMENT



BUSINESS
TRANSFER &
EXIT
STRATEGIES



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Ryan Kelly
CEO
Spectrum Asset Management

Contact Us Today

Ready to create a cohesive vision for your financial future and put it into action? Schedule a short call to see if working with Spectrum is right for you.

[SCHEDULE A CALL](#)