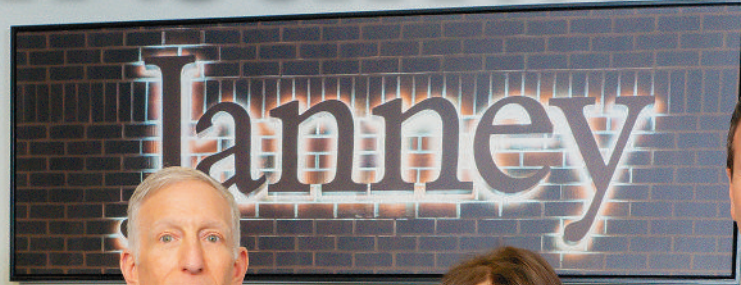


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The seasoned group of financial advisors at **Wyncote Wealth Management of Janney Montgomery Scott** uses a collaborative approach to guide clients toward their goals.

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by **Matt Cosentino**
photo by **Jody Robinson**



WINNING TEAM

The seasoned group of financial advisors at **Wyncote Wealth Management of Janney Montgomery Scott** uses a collaborative approach to guide clients toward their goals.

Financial planning can be a complicated subject for many individuals, and the fear or uncertainty they may associate with this crucial task often causes them to put it off. Finding the right professional to assist with those matters goes a long way toward easing those concerns—especially when the professional is part of a skilled team.

That's exactly the type of service clients can expect from Wyncote Wealth Management, a team of four financial advisors—Dolores Jordan, Andrew S. Vitek, Richard J. Robinson, and Paul Karsevar—each with more than three decades of experience in the industry. The team is part of the Wyncote branch of Janney Montgomery Scott LLC, a distinguished firm whose roots go back to 1832.

“The whole point of being on a team is that we all have strengths and we collaborate,” Jordan says. “If one person is out of the office and a client calls in, any one of us can step in and help. Collectively, the four of us have about 140 years of experience and we're well-established members in the financial industry. That's important, because panic is not an investment strategy. We have the experience to know how to advise clients when the markets get volatile.”

Wyncote Wealth Management works with clients of all ages—the team's client base includes multiple generations of families—and its financial advisors pride themselves on being approachable, accessible, and accountable to all of them. The Janney Montgomery Scott corporate family also serves as a tremendous resource.

“Through our corporate headquarters in Philadelphia, Wyncote Wealth Management has access to estate planning, retirement planning, and college planning, as well as specialists in all forms of insurance, corporate benefits planning, and access to a deep pool of tax-free, corporate, and treasury bond specialists,” Jordan says. “If a client is unsure of what to do, we have the

strengths, the experience, and the ability to help them. It can be clients who are just starting out, clients who are in their peak earning years, clients who are near retirement, or clients who are thinking about the legacy they want to provide to the next generation.”

The key is getting to know each one on a personal level to better understand their financial goals. An in-depth interview at the outset of the relationship helps to determine goals and risk tolerance, but just as important are the regular conversations the team has with clients. Whether they are interested in growth, growth and income, or just income, the team will utilize the appropriate investment vehicles to help clients work toward their goals and weather the storm of market volatility.

“Each client has a different perspective, but we customize our relationship experience and financial advice according to that client's investment objective, age, time to retirement, liquidity needs, etc.,” Karsevar says. “We have to be aware of all circumstances and changes, whether they get married, have children, change jobs, get divorced, retire, or go into a retirement community. All of that is contingent on our advice.”

The approach seems to be working rather well, considering that Wyncote Wealth Management handles over \$350 million in assets, constantly receives referrals from satisfied clients, and works with people not only from throughout this region, but also from more than a dozen countries outside the United States. Closer to home, its financial advisors sit on the boards of directors for several nonprofits and make significant contributions to their communities. Giving back is baked into Janney Montgomery Scott's DNA.

Most rewarding of all is leading clients to the retirement of their dreams.

“We do reviews every year with clients, some-

times more frequently, and we find out what their goals are in retirement,” Vitek says. “Is it to travel? Buy a beach house? Is it to start a foundation? Is it to spend more time with grandkids? Is it to take the kids and grandkids on a family vacation? Or is it just to be able to support themselves through their long-term care needs once they get older and need long-term care?”

“I've been doing this for 32 years, and I've always enjoyed helping people,” Jordan adds. “All of the team members—Paul, Rick, and Andy—feel the same way. We can give clients generational wealth management, one generation after the next, and we enjoy seeing them achieve their financial goals.”

Robinson adds, “Through constant contact with our clients and, should they desire, their family, we are able to make certain that their money does for them what they intend, that there are contingencies for any emergency such as a legacy plan, or a plan for valuing and selling a family business. Our team was designed by bringing together our various specialties and skills in order to offer the best possible experience for our clients.” ■

Wyncote Wealth Management at Janney Montgomery Scott LLC

8101 Washington Lane, 1st Floor
Wyncote, PA | (215) 572-4100
Advisor/Janney.com/Wyncote
Janney Montgomery Scott LLC.
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