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SI PARTNER PROFILE

by **Bill Donahue** | photos by **Jeff Anderson**

An Invaluable Ally

Approachable, accessible, and accountable, Wyncote Wealth Management Group strives to be a trustworthy partner for clients and the community alike.

A community is many things to many people: a place to call home, a built-in support system, a source of strength during challenging times. For a community to remain vital, however, Andrew S. Vitek believes its members must continually give back. For him and his fellow team members at Wyncote Wealth Management Group, philanthropy and community involvement are woven in their DNA.

"Our profession is wealth management, but we're involved with a lot more than that," says Vitek, First Vice President/Investments with Wyncote Wealth Management Group. "All of us live in the community and chose to raise our children here, and we want to see our clients and the community continue to thrive. Plus, it helps that when people see you doing good things, they want to be involved with you."

Wyncote Wealth Management Group provides philanthropic support to many local causes, such as the Abington Art Center, Abington Presbyterian Church, and Cradle of Hope, a Glenside-based organization that provides physical, emotional, and spiritual support to single mothers and their children. In addition, the group's four advisors—Vitek, along with Dolores Jordan, Paul Karsevar, and Richard J. Robinson, each with more than three decades of industry experience—participate on the boards of directors for area nonprofits. Vitek, for example, is a member of the advancement committee for the Ligouri Academy, a nonprofit private high school in Philadelphia's Kensington neighborhood devoted to helping underprivileged children succeed, academically and otherwise.

Such involvement has fed the group's continued growth. Wyncote Wealth Management Group, which is a part of the Wyncote branch of Philadelphia-based Janney Montgomery Scott LLC, handles more than $400 million in assets. The group serves clients of all ages, including many multigenerational families, throughout the Philadelphia area and across the United States; it also works with families and individuals from more than a dozen countries around the globe.

"People nowadays have a lot of information at their fingertips," Vitek says. "What clients need most from us is security, honesty, and integrity. They need someone who's going to pay attention to them and their needs, whatever those needs might be. With us, they get a team, and each of our team members focuses on a different part of a client's life, whether it's wealth management, retirement planning, taxes, or something else."

To his point, Wyncote Wealth Management Group provides estate planning, retirement planning, and college planning, as well as access to specialists in all forms of insurance, corporate benefits planning, and taxation. The firm's team of financial advisors, aided by Private Client Associates Tracy Schurter and Sabrina Rockelmann, pride themselves on being approachable, accessible, and accountable.

"We're interested in working with clients who want to feel secure in growing and preserving their wealth with us," Vitek says. "We also want to work with people who want to support the community, however they define the word. Many of our clients have common interests with us, which is ideal because having shared interests helps to deepen the relationships."

For example, Vitek has long had an interest in cars—racecars, in particular. He began racing cars approximately 30 years ago, about the same time he started his career in wealth planning. As a result, his list of clients has grown to include many car collectors and restorers, as well as some fellow racecar drivers.

While the Janney Montgomery Scott LLC corporate family offers essential resources and support, Wyncote Wealth Management Group takes a deeply personal approach to understanding each client's 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 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.

"We have seen a lot of uncertainty and volatility over the years, and I think what we've learned is that you can use that adversity to your advantage," Vitek says.

"Many of our clients are in post-retirement, our years of experience have enabled us to mitigate the fears of the unknown," he continues. "We're always watching out for clients, not only in terms of protecting their wealth, but also with things like elder abuse and electronic scams. No matter what kind of help they might need, we have systems in place to help make them more secure." ■

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