Many financial firms have a narrow focus: Selling investment products to their clients. At Copeland Wealth Management, we prefer to take a holistic approach. We want to help you pinpoint and meet all of your lifelong financial goals—including paying for college, saving and investing for retirement, and preparing to transfer assets to your beneficiaries.

Understanding your objectives and determining how to reach them starts with our getting to know you: We take the time to ask thoughtful questions and listen carefully to your responses. Our advice is customized—we take into consideration clients' unique and often complex financial and personal situations before making any recommendations.

By nurturing deep relationships, we are able to provide financial advice and investment recommendations specifically tailored for you. And you can rest assured that our only agenda is providing trustworthy guidance. Copeland Wealth Management does not charge sales commissions, which can create conflicts of interest: You pay us for our objective advice, period.

By helping you reach your financial goals, we reach our most important goal—becoming your trusted advisor.