Retirement can be one of the most rich and fulfilling periods in your life. The key is preparation.

Rob Copeland , President and CEO of Copeland Wealth Management, has built and managed customized retirement plans for a wide range of clients throughout his career. Working with Rob, individuals and families crystallize their retirement goals and take steps to ensure that they will have the means to reach them.

Successfully preparing for retirement requires both an accurate, realistic savings plan and a disciplined approach to investment. But Copeland Wealth Management goes further. Because life's road bumps can upset even the best-laid plans, we work to protect the portfolios of pre-retirees against setbacks such as illness or temporary loss of employment. Once clients have retired, Copeland Wealth Management manages their portfolios with an eye toward their long-term peace of mind.

Our holistic planning process, combined with our tools for retirement, can help to prevent shortfalls and ensure that you and your family enjoy the retirement of your dreams.