

401(k) & other Retirement Accounts

Is Your Portfolio on Track?

Let us help you manage your 401(k) and other retirement accounts.

Traditionally, accounts such as 401(k)s, 403(b)s and 529s were not managed by financial advisors, putting you further behind your financial goals. Advisors could not provide the ongoing management and oversight that is expected and required as a fiduciary due to limitations in technology. Now, there is a solution.



AOG Wealth Management provides holistic wealth management that includes all your accounts, even those in employer-sponsored retirement plans. We'll review your 401(k), 403(b) and other retirement accounts, include them in your holistic plan, and then monitor and rebalance them as needed.

Not only will our advice be more comprehensive, but you'll get a full view of your investments in every report.

Get started now.

All your assets deserve professional management.

Save and retire with confidence by integrating your employer-sponsored retirement accounts into your wealth plan.

- **The Value of Integrated Advice:** Having a professional advisor manage your retirement accounts can add 3% or more in annual returns, even after fees.
- **Truly Holistic Planning:** When your retirement accounts are integrated into your financial plan, your asset allocation is built to meet your specific needs. We'll also revisit it over time as those needs change.
- **Tax-Efficient Allocation:** Your advisor can ensure that the right investments are in the right places, reducing your tax burden and helping your portfolio to grow more quickly.
- **Ongoing Monitoring and Reporting:** Because your accounts are integrated, we'll send you statements that reflect your entire financial picture.



Comprehensive Account Management:

Consolidate all of your accounts.



Ongoing Guidance:

Have all of your accounts professionally managed.



Asset Location Strategies:

Optimize allocation & potentially reduce tax burdens.