

Special Advertising Section

## Marciano Wealth Advisors: Boutique Relationships, Generations of Experience

Openness, accountability and a close, personal affinity. These are the defining characteristics of the boutique relationships that affluent individuals, families and businesses have with Marciano Wealth Advisors, an independent, fee-based wealth advisory firm whose roots date back to the 1950's.

Managing Partner Michael Marciano has a simple mission for the firm. "We consider our clients' long-term interests our own, serve those interests passionately, and constantly evaluate how effectively and economically they are being met. To truly be valuable in the lives of our clients, we mustn't ever lose sight of that goal."

### For Clients, Communication Is Critical, Knowledge Is Power

With the principals of the firm having over 50 years of combined experience serving the complicated needs of their discerning clientele, certain underlying values cannot be forgotten. For one, Marciano believes it is critical that the client's voice be heard.

"We stress the old-fashioned art of listening," he explains. "Our clients are sometimes surprised that all of the questions we ask are not simply quantitative in nature. Their eyes light up when, for example, we ask, 'What is the footprint you'd like to leave on the world when you are gone?' What we do is much more than fee-based investment, financial planning and estate planning. It is legacy planning."

This can only happen, Marciano says, if clients are not merely informed customers but become educated and empowered. The firm has even gone so far as to offer adult education classes at local colleges and to provide lunch symposiums to key executives of their corporate clients.

"We've held sessions covering topics as diverse as estate tax planning concepts, charitable giving, investment portfolio design and succession planning for closely held businesses," says Senior Partner Joseph Marciano. "We explain everything in detail so our clients understand our methodology and become partners in their planning — to embrace their role in the process. We find that educating consumers helps them crystallize ideas about their own wealth planning."



Left: Joseph A. Marciano, CFP®, CFS (Senior Partner)  
Right: Michael E. Marciano, CFP®, CLU, ChFC (Managing Partner)

### Accountability: How Do Clients Measure Success?

Critical to their commitment of providing unbiased advice, Marciano Wealth Advisors stress that they have no proprietary products to consider and no commissions to sway their decisions. Beyond that, on a quarterly basis, their clients are provided with performance reporting, face-to-face meetings and an analysis of their portfolios' performance relative to risk and net of fees. The communication process is never ending; the opportunity to educate is never overlooked.

### A Cohesive Team Approach Is Often Best

Using unusually sophisticated methods in the investment as well as the estate and financial planning arenas is just the starting point of the value proposition of the firm. Coordinating those efforts with

clients' existing advisors, Michael Marciano explains, is often key to a successful plan.

"We need to ensure that whatever considerations we employ for our clients work seamlessly with any existing or future planning that might occur. We frequently will work in concert with our clients' accounting and legal professionals so that every aspect of a decision is thoughtfully considered. With our clients, there can simply be no shortcuts."



357 S. Gulph Road, Suite 230 • King of Prussia, PA 19406 • 610-992-4100 • [www.MarcianoWealthAdvisors.com](http://www.MarcianoWealthAdvisors.com)

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