



N E X T
G E N E R A T I O N
W E A L T H M A N A G E M E N T

A F I R M B A S E D O N I N T E G R I T Y , P E R F O R M A N C E
A N D A N U N D E R S T A N D I N G O F E A C H C L I E N T

Mission

Our mission is to provide each client with the comfort and confidence of knowing we are dedicated to preserving and building their wealth over the long term.

Vision

We will be known to our clients as the firm with a vision for financial security and recognized by the industry as a firm that genuinely cares about its clients' financial well-being and enrichment of their lives. We will be the firm chosen for its quality products and services delivered with integrity and expertise. Our clients' decision in choosing Next Generation Wealth Management will be reinforced by our dedication to consistent performance, capital preservation, and superior personalized service.



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Our Core Values

At Next Generation Wealth Management we are deeply committed to:

OUR CLIENTS AND ASSOCIATES Our clients and associates are the most important asset of the firm. We are committed to recognizing individual and team contributions to the client. Associates thrive at NG Wealth Management based on their dedication to our core values, their dedication to our clients, and their ability to grow and adapt in a changing environment. Our clients experience the unique character of the firm in every interaction with a NG Wealth Management associate.

CREATING VALUE We approach each investment and assignment with the pledge to exceed the goals and expectations of our clients and ourselves. We believe that hard work and a commitment to doing things the right way the first time, is the path to generating consistent results for clients and associates. We respect the effort it takes our clients to accumulate the assets they entrust to us, and are dedicated to delivering a superior client experience.

PERSPECTIVE Grounded by a long-term outlook and the lessons of history, we steadily guide clients from a thoughtful & solid foundation. As a privately held firm, we answer only to our clients. Our relationship with each client is based on a clear understanding of their investment behavior and a passion to help them achieve their financial goals. We seek to leave a positive imprint on the lives of our clients while being an active and supportive role model in community endeavors.

DEVELOPMENT AND THE FUTURE We provide associates with a wide range of learning opportunities from inside and outside the investment world to broaden the perspective of the firm, harness change and create opportunities for our clients and associates. A clear focus on developing our associates enables NG Wealth Management to fulfill our client commitment as set forth in our vision.

THE HIGHEST ETHICAL STANDARDS We are devoted to maintaining integrity, trust, honesty, and professionalism as the foundation of our decisions, actions, and client relationships.