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<b>Dow</b>	10318.16	<b>-14.28</b>	4:31pm
<b>Nasdaq</b>	2146.04	<b>-10.78</b>	5:30pm
<b>S&amp;P 500</b>	1091.38	<b>-3.52</b>	5:01pm

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## Matthew P. Bartolomei

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### Welcome



With over 15 years of professional experience, I bring diverse skills and perspective to wealth management. By combining my knowledge of finance with my desire to help families live more meaningfully, I have realized my professional and personal goals.

Understanding my clients' needs and objectives is essential to the planning process. I perform comprehensive client evaluations designed to determine my clients' personal and financial objectives. I seek to understand my clients broadly and deeply enough to find the opportunities that are consistent not only with their financial objectives, but also their values. In conversations with my clients, I help them determine what's really important, and then develop an actionable, flexible financial plan that is a roadmap for the future.

Part of my practice includes working with divorcing individuals, their attorneys, and collaborative professionals to help navigate the complex emotional and financial issues associated with divorce. From budgeting to post-divorce investment management, I strive to help my clients become more knowledgeable, confident, and empowered about their financial future.

My practice is built on three pillars: honesty, integrity, and perspective. This approach enables me to build meaningful, long-lasting relationships with my clients and their families.

### Bulletin Board

- Do you have an estate plan for a life you no longer lead? If you would like to update your plan, speak with us.
- Is aligning your investments with your values and social beliefs important to you? If so, talk to me about socially responsible investing.

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