



riversedge

WEALTH PARTNERS

**TAKING
CARE,
BEYOND
INVESTMENTS**



OUR COMMITMENT

TAKING CARE, BEYOND INVESTMENTS

River's Edge Wealth Partners is dedicated to helping you develop, implement and monitor a wealth strategy that's designed to address your needs, wants and long-term objectives.

WE UNDERSTAND THE CHALLENGES FAMILIES FACE TODAY.

From managing debt to saving for college to planning for retirement, River's Edge Wealth Partners is there for you every step of the way. Our commitment is to utilize our resources to help you accomplish your objectives and protect your legacy.

We believe in thinking "out of the box" and are not afraid to challenge conventional wisdom to invest and preserve wealth. All of our energy, commitment, and efforts are focused on you, the client, and your satisfaction.

FAMILY OFFICE

Through investment management, charitable giving advice, budgeting, wealth transfer and tax planning, our family office will create a total financial strategy tailored to your goals.

We work with our strategic partners to help ensure your family's wealth plan and legacy are well-coordinated and optimized.

FAMILY OFFICE SERVICES INCLUDE:

- Investment Management
- Wealth Transfer Planning
- Management of Business Interests
- Estate Management
- Management of Family Trusts
- Philanthropic Guidance
- Educating Family Members on Financial Matters
- Tax Planning

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LEARN FROM YESTERDAY,
LIVE FOR TODAY, HOPE FOR TOMORROW.

- ALBERT EINSTEIN



OUR COMMUNITY



RED BANK, which gets its name from the red soil banks of the Navesink River, has a rich history going back to the 18th century. Our vibrant town is the gateway to the Two River Peninsula. Located in the business district, it sits beautifully along the magnificent Navesink River and offers the best of both worlds: natural beauty and historic architecture.

One of the most famous buildings is the Galleria, originally known as the Eisner building. During WWI and II, the building was a textile factory producing most of the uniforms worn during the wars. If you look inside an old army uniform or a WWII Air Force leather jacket, you may find the Eisner label.

OUR FOCUS

In short, our focus is you—your financial goals, your legacy and your retirement.

We know that many people are concerned about outliving their money. Some want a measured, low-risk strategy, while others want to be more aggressive. Some want to structure a financial plan that leaves a legacy for their family while others just want a comfortable retirement.

Whatever your goals, we'll customize an investment strategy to meet them.

And if your goals change, the market fluctuates or different investment products become available, we'll give you individualized advice about how to protect your retirement.

As your family office, we'll be with you every step of the way—through all of life's changes—helping you secure and maintain a sound financial future.

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CHANGE IS THE LAW OF LIFE. AND THOSE WHO LOOK ONLY TO THE PAST OR PRESENT ARE CERTAIN TO MISS THE FUTURE.

- JOHN F. KENNEDY



FINANCIAL PLANNING

- Retirement Plans
- Tax Planning Strategies
- 401 (k) Planning
- 403 (b) Planning
- College Plans
- Estate Planning
- Money Purchasing Plans
- Profit Sharing Plans



INVESTMENTS

- Bonds
- Common Stock
- Educational IRA
- Traditional IRA
- Roth IRA
- SEP IRA
- Simple IRA
- Brokerage Accounts
- Treasury Bills
- Government Securities
- Treasury Notes
- Variable Annuities



INSURANCE

- Disability Income Insurance
- Life Insurance
- Long-Term Care Insurance

*LPL Financial representatives offer access to Trust Services through The Private Trust Company N.A., an affiliate of LPL Financial.

OUR BRAND STORY



Our office in Red Bank is in the old Mechanic School building known for its modern industrial feel. We were drawn to this location because the historic building captures the spirit of our city's commercial and manufacturing roots. At the same time, the river creates the perfect scene and story for River's Edge.

The Navesink River's function evolved over the years, from the 1800s when it was a port for steamboats that ferried workers into Manhattan, to present-day use as a source for recreation. During most of the year, the river is used for boating, crabbing, fishing, sailing, canoeing, kayaking, bird watching, swimming, and rowing.

Tony Frigoletto, our founder and managing partner, saw it as the ideal place for our office, and we honor its beautiful, distinctive shores in our name: River's Edge.

Like a river, one's financial life can often have twists and turns, but if you have a plan and are prepared for those turns, those powerful currents can bring you to your destination.

Tony and his River's Edge team have a proven track record of helping clients navigate whatever financial currents come their way so that their investments are protected and they can live the life of their dreams.





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