

COMPANY OVERVIEW

Founded in 2013 by Paul LaViola and Stephen McDade, Foundation Wealth Management is an independent wealth management firm located in the heart of downtown Media, Pa.

FWM works with individuals and families to organize, grow and preserve their wealth. As a fee-only “Registered Investment Advisers,” FWM is legally held to a fiduciary standard for its clients, in contrast to the majority of financial advisors who are “Registered Representatives” of broker dealers.

Fee-only financial planners don’t sell products and are not commissioned salespeople for insurance or brokerage companies. Rather, clients hire and pay the advisors directly. This model removes potential conflicts of interest and clients receive a comprehensive financial plan that incorporates the following elements:

- An analysis of the client’s life and financial goals
- Cash flow management
- Investments, including 401(k) plan assets
- Risk management and recommendations for specific insurance coverage
- Tax planning and management
- Retirement planning
- Debt management
- Educational funding
- Estate planning

FWM’s mission is to remove the undue worry, frustration, and stress from clients’ financial lives in an ethical and caring way, equipping them with objective advice and guidance to reduce risk, gain peace of mind, and achieve life goals.

LaViola and McDade are members of NAPFA (The National Association of Personal Financial Advisors), the country’s leading professional association of fee-only financial advisors. Both have worked at some of the country’s top financial planning firms and have helped numerous families and individuals throughout the tri-state area organize their financial lives and get on track financially. For additional information, visit <http://myfoundationwealth.com>, or call (610) 548-7170.