Portfolio Management

We have refined a process that enables us to customize a portfolio to each client's risk tolerance, time horizon and goals. Through a rules-based, disciplined investment strategy we provide each portfolio with the proactive service to assist our clients in pursuit of their goals.

To learn more go to www.denniswallace.com

IRAs

Brokerage Accounts

Stocks & Bonds

Variable Annuities

Financial Planning

To get where you want to go, you need to know where you are. A thorough evaluation of your current and future financial picture is critical to develop a sound plan. As important, is an ongoing assessment to determine if you are on-track or if a mid-course adjustment is necessary. Together we can develop a plan with the goal of helping your finances grow thoughtfully, conserve prudently and distribute efficiently.

To learn more go to www.denniswallace.com

Income Planning

Investment Strategies

Retirement Plans

Tax Planning

Risk Management

We help you identify the risks that may have the greatest potential to impact your financial well-being. We analyze your insurance program; life, disability, and long-term care to determine effectiveness and efficiency.

To learn more go to www.denniswallace.com

Beneficiary Designation Review

Disability Income Insurance

Life Insurance

Long Term Care Insurance

Estate Planning

The goal of a successful estate planning strategy is to effectively manage assets and to assist in the efficient distribution of wealth after death. An effective strategy also includes healthcare wishes, even if incapacitated or otherwise unable to communicate.

To learn more go to www.denniswallace.com

Private Trust Services*

Wills & Trusts Education

Charitable Giving and Family Foundation Strategies

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

As a veteran of the United States Air Force, Dennis Wallace fully understands the importance of service to others. His generosity of service is reflected in both his work and lifestyle. Dennis is a member of Rotary International where he gives his time, talent and treasures making an impact, both locally and globally. Additionally, he has served on several non-profit boards and currently serves on the finance committee of Act in Faith. The Mayor of West Chester has presented him the key to the city and he was also honored as Philadelphia's Outward Bound's Volunteer of the Year.

As a trusted wealth advisor with extensive experience in the financial services field, Dennis weaves that same mindset of service and stewardship in the important work of helping his clients pursue their financial goals. On days off, Dennis and his wife Carol, both avid sailors, enjoy spending time on their boat sailing on the Chesapeake Bay.

FPA Wealth Management

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