MA Private Wealth Celebrates 30 Years of Financial Advising, Offers Enhanced Services for Tech Professionals

San Carlos and Campbell, CA - March 29, 2022 - MA Private Wealth, a boutique private wealth advisory, celebrates 30 years of financial advising this year. With two Bay Area offices, the firm has evolved over three decades right alongside Silicon Valley itself, home to dozens of Fortune 500 technology companies. As evidence of continued growth, MA Private Wealth has refined their service designed specifically for tech professionals.

"We have always taken pride in using a sophisticated, customized approach to investment management and financial planning, paving the path to financial stability for our clients," said MA Private Wealth CEO and Private Wealth Advisor, Marty Miller.

"This approach is particularly relevant for tech professionals, who have complicated compensation packages and can face challenges understanding their full financial picture. We're committed to guiding these individuals toward a strategy they can be confident in—one that will meet their immediate financial needs as well as their long-term goals."

The MA Private Wealth services designed for tech professionals include:

- Developing a strategy for stock options, deferred compensation, RSUs and ESPP
- Evaluating benefit packages
- Creating a plan for financial stability amid M&A activity and other uncertainties
- Navigating severance packages
- Limiting unnecessary exposure in the market
- Creating financial modeling and projections
- Unifying investment strategy and consolidating old 401(k) plans and other investments
- Planning for retirement and creating income projections
- Investing bonuses or other "extra" cash
- Simplifying financial management with a comprehensive, unified investment strategy
- Building saving strategies to optimize cash flows and income
- Architecting tax-efficient investment strategies

Over the years, MA Private Wealth has made tactical changes to better serve clients' needs, including becoming a registered investment advisor (RIA) in 2018. The transition further strengthened the trust long-standing clients have in the firm.

“Since becoming independent four years ago, our expert team of fiduciaries has successfully deepened our client relationships, building a white glove service model that delivers on our promise of simplifying the complex,” Miller said.

MA Private Wealth excels in customer satisfaction. With a retention rate of 98%, clients have been with MA Private Wealth for an average of 15 years. But it has also grown since forming an independent RIA, increasing assets under management (AUM) by 40% in the last four years, bringing the combined AUM and assets under advisement (AUA) to approximately $1B.

Internally, MA Private Wealth has doubled down on its customer-centric approach by adding a financial advisor (Vijay Patel) and two relationship managers (Gabriela Carreno and Mallory Davis) to the MA Private Wealth team in the last year.

“Growing our team, and now renewing our focus on serving tech professionals, is evidence that we value our clients,” said MA Private Wealth COO and Private Wealth Advisor, Erica Arroyo. “Our team is thoughtfully structured to provide service with our core values in mind: customer-centricity, simplicity and effectiveness. When you work with us, you’re going to see those values and experience a customized approach with every interaction.”

As the team looks toward the future and increases their exposure with tech professionals, they plan to continue tapping into their collective institutional intellect to be their clients’ most trusted partner.

“Life is complicated, and we want our clients to be at ease no matter what comes their way,” said Miller. “Our experienced team will continue putting our clients’ needs first in everything we do. Our clients are why MA Private Wealth has thrived over the past thirty years. We are so grateful for their partnership, as well as their referrals, so we can continue growing and helping others.”

For more information on the tech professional financial advisor readiness quiz, click here.

About MA Private Wealth

MA Private Wealth is an independent registered investment advisor with 30 years of experience, offering a tailored, sophisticated approach to wealth management via white glove service. MA Private Wealth prides itself on delivering institutional intellect that simplifies the complex, helping clients create the financial future of their dreams. The expert team of fiduciaries works out of San Carlos and Campbell, California. Learn more at maprivatewealth.com.