Bryan Wisda, CFP®

President at Almega Wealth Management LLC

Scottsdale, AZ, US

Wealth Manager to Successful Families & Driven Entrepreneurs

Biography

I work with a select number of successful families and driven entrepreneurs, for whom I can have a significant impact, by helping them gain control of their financial life. At some point, everybody asks, "Will I have enough?" This can be very tough question to answer, especially entrepreneurs. My purpose in business is to help successful families and driven entrepreneurs by answering the question, "Will I have enough?" and empowering them to gain control of their financial life. This is accomplished using unique transition management and wealth management processes in collaboration with an expert team. It allows my clients to live a simple and elegant life. My company, Almega Wealth Management LLC operates on a fee-for-service basis only. I do not sell any investment or insurance products and do not receive commissions for products that are recommended. The ?fee-only? approach to wealth management means that clients receive impartial, objective advice to eliminate potential conflicts of interest. I acknowledge a fiduciary responsibility to my clients, and, as such, pledge to place their needs first in all that I do. For those who are interested in my approach, I offer a complimentary second opinion service. I only work with those whom I can have a significant impact. If I feel as though I would not be able to have a significant impact I will refer you to a more appropriate firm. Please feel free to contact me directly at 480-440-4700 (Scottsdale, AZ), 270-820-2056 (Greenville, KY), 336-789-6241 (Mount Airy / Winston-Salem, NC) or via email at bryan@almega-wealth.com

Industry Expertise

Investment Management, Financial Services

Areas of Expertise

Investment Management, Financial Planning, Business Ownership and Succession, Mergers & Acquisitinos, Passive Investment Management

Affiliations

CERTIFIED FINANCIAL PLANNER?

Sample Talks

Savvy Social Security Planning For Women

Social Security is one of the few income sources that keeps up with inflation and lasts for life. But most women fail to maximize their benefits because they don?t understand the little-known rules that can help them get more out of the system. This workshop will cover: How the decisions you make in your 60s can determine the amount of income you?ll have in your 80s How to take advantage of spousal benefits, survivor benefits, divorced-spouse benefits, and even divorced-spouse survivor benefits How to coordinate your own retirement benefit with benefits you might receive as a spouse or divorced spouse Why women who are married should make the decision about when their husbands should apply for Social Security Why you should consider your husband?s life expectancy when deciding when to claim your own retirement benefit. What to do if your husband or ex-husband dies What to do if your marital status changes This workshop is for women and for men who have women in their lives (wives, sisters, mothers). It features essential information all women need to have if they are concerned about financial security in retirement.

Education

University of Arizona

BA Philosophy

Boston University

Certificate Financial Planning

Rio Salado College

Coursework Adult Education
