Frequently Asked Questions

How do I get started?

Mowatt Financial will provide a free one-hour initial consultation to review your investment portfolios and insurance needs. We would be happy to sit down with you and discuss your goals, and objectives and your current financial situation. At this point, if you have decided to work with Mowatt Financial, we will guide you through the implementation process to fully establish our professional relationship. Part of the initial process can include the development of a comprehensive financial plan.

Does Mowatt Financial have a minimum Net Worth or account size?

Mowatt Financial has no account minimums other than those imposed by certain products. Mowatt Financial works with clients from all walks of life, from school teachers and college professors to Fortune 500 executives and professional athletes. No matter the size of your portfolio, Mowatt Financial will spend the time to make sure your specific needs are addressed.

How is Mowatt Financial Compensated?

Mowatt Financial has various fee and commission structures, one of which may be most appropriate for your needs. We will be happy to discuss with you exactly how Mowatt Financial can be compensated based on your specific investment needs.

Are your advisory fees tax deductible?

Advisory fees paid for services performed by Mowatt Financial Inc. may be tax deductible. Please consult your tax professional for further information regarding your specific situation.

What areas will Mowatt Financial provide advice for?

Mowatt Financial Inc. provides full service, comprehensive financial planning and investment advisory services. This includes:

- portfolio management,
- retirement planning & projections,
- life insurance (including 2nd-To-Die policies),

- real estate (Including §1031 TIC Tax Deferred Exchanges*),
- corporate retirement plans (including 401(k) investment elections),
- education planning and funding,
- corporate stock options & grants

We also work with business owners to ensure that their practices will be protected in the event of unforeseen future events.

What is Mowatt Financial's investment strategy?

Mowatt Financial will seek to diversify a client's assets across many different asset classes using both traditional (Stocks, Bonds, Mutual Funds, Exchange Traded Funds) and non-traditional (non-traded REITs, Third Party Money Managers, Private Placements*) investments. The advisors of Mowatt Financial are dedicated to a long-term approach and each client's portfolio is crafted to his or her specific investment goals and objectives. Before any investments are made, written proposals are always presented to clients for approval.

**Investments Available to Accredited Investors Only*

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