GREGG REICH, AIF®

Private Wealth Advisor, RJFS

Gregg Reich provides financial advice and services to individuals, families, and businesses through an ethical and strategic wealth management process.

As an Accredited Investment Fiduciary (AIF®) with more than 18 years of industry experience, Gregg works closely with his clients to develop individualized strategies for wealth accumulation, retirement income, and estate transfer. He also has significant experience in the design and implementation of qualified retirement plans for both nonprofits and for-profits.

Gregg's goal is to deliver an exceptional wealth management experience. His advice emphasizes prudence, tax-awareness, and value-focused investing. As a primary portfolio manager of his clients' investments, he works to simplify their financial lives. His practice works to optimize savings strategies, reduce risk, create income, and diminish investor anxiety through a factual understanding of market history and behavioral finance. This involves regular review of investment success in relation to the markets and his clients' lives. Annuities, insurance, and trust strategies are also important considerations in his clients' estate plans.

Most recently Gregg completed the Program in Investment Management Theory & Practice at the Yale Executive Education School of Management. In 2021 he was named to the Raymond James Executive Council II. Gregg holds FINRA Series 7, 31, 66, and life and health insurance licenses. He obtained his Master's Degree in Technical & Science Communications from Drexel University and his Bachelor's Degree in English/Economics from Lehigh University.

NOTE: Raymond James does not provide tax or legal services. Please discuss these matters with the appropriate professional.

GREGG REICH, AIF®
Private Wealth Advisor, RJFS

103 N. Main Street // Cape May Court House, NJ 08210
609-463-1062
gregg.reich@sturdyfinancial.com

RAYMOND JAMES®