Financial Advisor Asset Management & Advisory Services Opens A New Location In Cape Coral

February 09, 2022

Cape Coral, Florida - February 09, 2022 - PRESSADVANTAGE -
Lee County, Florida, financial advisor Asset Management & Advisory Services has started operations at a new office that is located at 1222 SE 47th St Suite 304, Cape Coral, FL 33904. The office can be contacted at the phone number (239) 356-1515.

Asset Management & Advisory Services specializes in providing a range of financial services to private individuals and businesses such as wealth management, retirement planning, financial planning, and insurance risk mitigation strategies. The company says that its goal is to help its clients get a grip on their current asset portfolio and put in place plans for preserving and increasing their net worth over their lifetime. The company is an independent financial advisor (IFA) which means that it is not beholden to any financial institution when it comes to suggesting investment opportunities and products for its clients, resulting in unprecedented freedom in the ability to choose financial solutions that are tailor-made specifically for its clients? needs.

The company?s owner, Peter Casciotta, talks about its approach to serving its clients by saying, ?Our foremost aim is to build a strong, healthy working relationship with our clients. We want them to be comfortable in trusting us with their most valuable assets and the fruits of their life?s labor. This level of trust can?t be built overnight. It is an iterative process that begins with opening a line of honest communication regarding the client?s finances and then making incremental actionable suggestions so that our clients can watch the results for themselves. We dedicate a lot of time and resources to studying financial markets and trends to find the most appropriate investment opportunities.?

The company also asks potential clients to do their due diligence before trusting an independent financial advisor. A credible advisor will be able to illustrate their competency by their qualifications, of which there are many, based on the type of services that the financial advisor company is offering. According to the company, a Certificate in Financial Planning is the bare minimum requirement that a financial consultant must be able to meet while advanced qualifications might be necessary based on their specializations.

Peter Casciotta has paid his dues when it comes to showing that he has got the chops in seeking to give his clients the most accurate financial advice. Peter holds licenses for having cleared the Series 7 (General Securities Representative Exam), Series 65 (Uniform Investment Adviser Law Examination), and Series 63 (Uniform Securities State Law Examination) with FINRA (Financial Industry Regulatory Authority) since 1994. Currently, Peter Casciotta is a registered representative of and conducts securities transactions through CoreCap Investments, LLC. He is also an investment advisory representative of and provides advisory services through CoreCap Advisors, LLC.

Peter has also demonstrated plenty of entrepreneurial zeal in his long and storied career. Prior to his career as a financial professional, he raised capital to fund the establishment of Projectavision Inc., a hi-tech corporation responsible for the creation of the LCD video projector. Ever since he started practicing his current trade of dispensing invaluable financial advice, he has managed to establish himself as a prominent voice in the financial community through his dedication to sharing his knowledge and insight with his peers and demonstrating outstanding results in the form of growth of the portfolios under his supervision.

The company also recently launched a brand new website that lists all of its services, upcoming events, helpful informative resources, and links to its social media. The financial planner company can be contacted through a simple chat functionality on the new website for a one-on-one conversation with one of its representatives.

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For more information about ASSET MANAGEMENT & ADVISORY SERVICES, contact the company here:ASSET MANAGEMENT & ADVISORY SERVICESPeter Casciotta(239)

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ASSET MANAGEMENT & ADVISORY SERVICES

As financial advisors, we know that a good business is built on relationships. That?s why we dedicate ourselves to our clients, making sure our partnership is as good as it can be.

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