Virginia Certified Financial Planners Launch Their New Website

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At a time of great uncertainty, these Virginia Certified Financial Planners have launched their new website focused on providing resources for people in significant transition and small business owners.

Omega Wealth Management has recently launched a new website to reflect the unique resources they offer to those in significant transition, as well as for small business owners. Omega?s approach, the Omega Method, takes a holistic and comprehensive approach to financial planning. The goal is to align their client?s values, vision and wealth. As Certified Financial Transitionists®, as well as Certified Financial Planners®, they help clients understand the 4 Stages of Transition and the positive and challenging emotions that can come with significant transitions such as retirement, career change/loss, loss of a loved one, and sale of a business.

Website visitors can explore Omega?s three offerings: The Life+Wealth Integrator, the Transition Navigator and the Entrepreneurial Edge. Starting with several assessments including the Communication Preference and Kolbe profile, which help one assess their natural strengths and abilities, Omega is able to personalize their approach with each client. Through a series of life planning exercises, the client and Omega are able to get a sense of the client?s most important priorities and values. A vision is then created that becomes the cornerstone of each client?s financial and investment plan. The plan covers every aspect of a client?s financial life: cashflow, taxes, education, retirement, insurance, investments and estate planning. For business owners, there is often a business-related review of these same issues. Once the plan is created, Omega works with the client to develop a goals-based investment strategy that supports the plan and life vision. For clients in transition, the Transition Navigator process meets the client where they are and helps them address the unique issues, concerns and considerations of their transition.

The website is user friendly in a faster format and provides examples of the types of clients that Omega works with as well as examples of how Omega?s approach may differ from other financial advisors. For existing clients, the login portal provides access to key websites that help the client access investment accounts and other financial information, as well as a secure vault for transferring information. Omega?s blog provides both video and written blogs with timely information on current trends and useful resources. Clients can rely on the site for useful, relevant information whether they are on a laptop or their smartphone. The new website is a responsive, mobile-friendly design.

Omega Wealth Management is a woman-owned business located in Arlington, Virginia and founded in 1999. Their diverse team consists of Certified Financial Planners®, Certified Financial Transitionists®, a Registered Life Planner®, and a Certified Investment Management Analyst®. Their purpose and passion is to have a positive and significant impact on their clients, community and profession. To visit their new website, go to https://www.omegawealthmanagement.com.

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Omega Wealth Management

Why Omega?
Beyond Simple Financial Management

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