



When it comes to managing their wealth, executives and professionals have unique needs.

Their retirement plans are different. Their professional options are greater. And the focus that their work requires makes the services of a trusted financial advisor essential.

[Rob Copeland](#), the founder of Copeland Wealth Management, has helped countless corporate executives, medical and legal professionals and other successful clients to achieve their personal and financial goals. His expertise includes everything from optimizing cash flow to limiting the impact of taxes to balancing risk and return in ESOPs and other non-traditional retirement plans.

Copeland Wealth Management's clients have found the freedom to excel in their careers, secure in the knowledge that their investments are in good hands. Whether your plans include retiring early, jumping into your own business or simply being the best at what you do, we provide the solid financial foundation that you need.