



It is unfair to have to deal with financial matters during a time of pain and loss—yet doing so is imperative.

At Copeland Wealth Management, we understand how important it is to have a trusted advisor and advocate during this difficult period. We will use our skills and experience to guide you through the financial steps that are necessary to protect you and your family, now and in the future.

We handle all the necessary coordination with your estate attorney—and can help find the right one to represent you if you don't yet have one. We take the lead in contacting your financial institutions, government agencies and other involved parties to take the steps necessary to move forward.

We arrange to protect your assets against undue taxation and make sure that you retain control of them. And we help you secure your financial future: We work with you to build a detailed financial plan, and we build and manage your investment portfolio to meet your goals and objectives.

In the midst of an emotional upheaval, dealing with your finances can be a daunting task. At Copeland Wealth Management, we will help you get started, and then support you every step of the way.



[Military Widows Guide](#)