It's about consistency.
It's about trust.

We want our clients to know they can count on us regardless of how the market is doing.

Our clients have worked hard for their money and regardless of what stage of planning they may be in, we believe they should enjoy peace of mind and confidence in their future.

That's why our mission and passion is to work personally and intently to enhance the lives of our clients by helping to map and manage their personal economy.

If you're not already a part of our growing financial family, we invite you to schedule a visit to further discuss how we can help you achieve your goals.

VG

Vance B. Gray, Jr., CFP®
Founder/Senior Financial Advisor

Financial planning is not about doing it one time. It's not a binder you put on the shelf and say 'well that was a good idea'.

VanceGray WEALTH MANAGEMENT INC

VanceGray TAX CONSULTING SERVICES

GrayStone insurance company

www.VanceGray.com

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VanceGray WEALTH MANAGEMENT INC

Smart wealth management isn't black & white. It's Gray.

Asset Management

Retirement Planning

401(k) Advisory

Tax Services

Estate Planning

Tax Preparation & Planning

We understand that your tax situation is unique and deserves a tailored approach to meet your goals.

Here's how we can help: Comprehensive tax services and planning. Our priority is to connect with you consistently throughout the year to develop a custom plan to reduce your taxes.

Tax planning and preparation are our specialty. Whether you are an S-Corporation, C-Corporation, Estate, Partnership or an Individual, we'll help you navigate the complexities of the tax system with a clear vision to reach financial success.

VanceGray TAX CONSULTING SERVICES

We want our clients to know they can trust us to be there - to answer questions and provide solid advice.

Investment Services

At VanceGray, we know that wealth management is a personal process. There is no cookie cutter plan that works for everyone. When you engage with VanceGray Wealth Management, we take the time to evaluate and discuss six key areas of your personal economy:

- Your Current Financial Position
- A Risk Management Assessment
- Your Income Tax Plan & Strategy
- Retirement Planning
- Complete Investment Reviews
- Estate Planning

VanceGray WEALTH MANAGEMENT INC

We take the time to evaluate and discuss what's best for your goals and your personal economy.

Insurance

Risk is something we all must live with. How much risk is what needs to be determined. By carefully and comprehensively assessing what types of insurance are best to protect your financial plan we can help you safeguard not only your family but your financial future. Through our relationship with GrayStone Insurance we offer programs/ protections for the following:

- Life
- Disability
- Long-Term Care/Nursing Home
- Business Continuation
- Group Coverages

GrayStone insurance company

Risk is something we must all deal with. Helping you manage the risk is our commitment.

*Insurance provided through GrayStone Insurance Company.