NexTrend Finance

Home | Why NexTrend Finance | Strategic Guidance | Working Together

Contact | Login

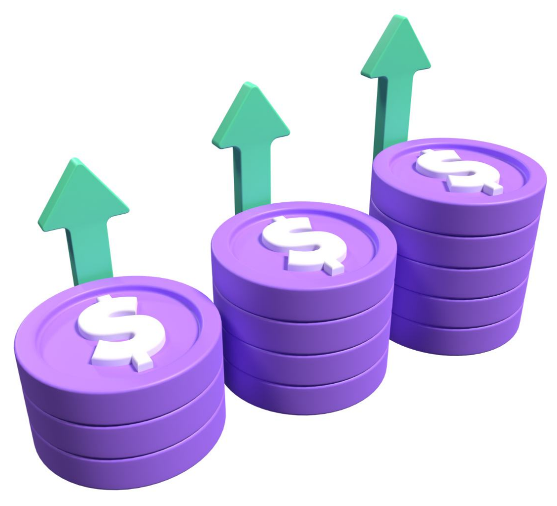
Empowering Your Financial Future

Our mission is to guide you toward a prosperous financial future with tailored investment strategies and expert financial advice. Whether you're planning for growth, managing wealth, or seeking financial security, we provide the insights and tools you need to achieve your goals with confidence and clarity. Let us help you navigate today's market to secure tomorrow's success.

Let's talk

About Us

With years of expertise in the financial and investment field, our team is dedicated to helping clients build secure and prosperous financial futures. We provide personalized guidance, crafted to meet unique goals and navigate complex markets. Our commitment to trust and transparency ensures that every client receives clear, strategic advice tailored to their needs and aspirations. Let us partner with you on your financial journey.



+100 Advisors

23B Clients assets

Expertise

WHAT CAN YOU EXPECT FROM US?

Personalized Financial Strategies

We take the time to understand your unique financial goals, tailoring our advice to create a roadmap that aligns with your vision for the future.

Proven Expertise

With years of experience in the financial industry, our team brings in-depth market knowledge and a record of success to every client relationship.

Transparent & Trustworthy

We prioritize clear communication and full transparency, ensuring you understand every step of your financial journey with us.

Long-Term Partnership

We are committed to building lasting relationships, supporting you with guidance and insights as your financial needs evolve over time.

Learn more about NexTrend Finance ⟶

Services

- Financial Planning
- Investment Management
- Tax Planning
- Risk Management
- Wealth Planning
- Retirement Planning

Customized Services

Our Customized Services provide tailored financial strategies that align with your unique goals, from managing alternative investments to multi-generational wealth planning. We're here to create a personalized roadmap to help you achieve lasting financial success.

Alternative Investments

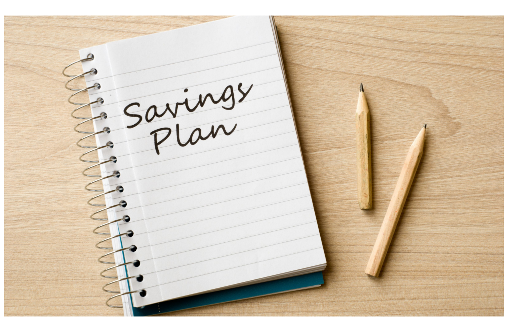
Advising on and managing non-traditional investments, such as private equity, hedge funds, commodities, real estate, and other alternative assets that can diversify a portfolio and offer different growth opportunities.

ESG and Impact Investing

Providing guidance on investments focused on environmental, social, and governance (ESG) criteria or impact investing for clients looking to align their portfolios with specific ethical values or social causes.

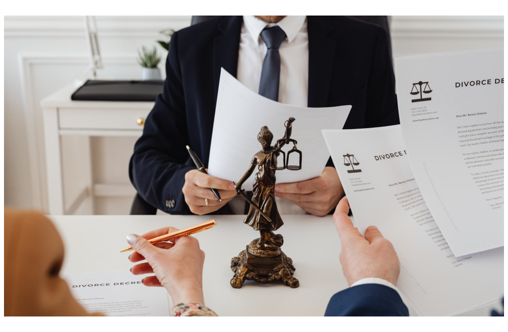
Business Succession Planning

Helping business owners plan for the future transition of their company, including identifying succession options, valuation, tax considerations, and setting up structures for a smooth handover.



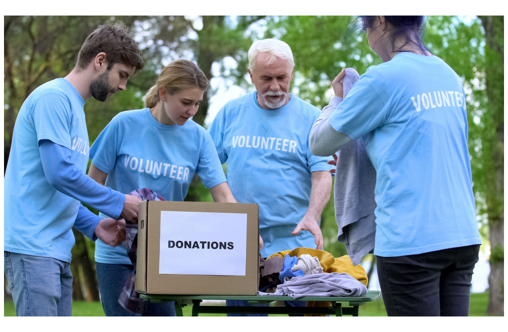
Special Needs Planning

Assisting families in setting up trusts, savings plans, and other structures to ensure the financial security and care of family members with special needs.



Divorce Financial Planning

Providing specialized financial advice during divorce, including asset division, spousal support, tax implications, and future planning to protect financial well-being post-divorce.



Philanthropic Planning

Creating personalized charitable giving strategies, family foundations, and donor-advised funds to facilitate effective philanthropy while optimizing tax benefits.

Team

MEET OUR ADVISORY TEAM

Emma Watt
Sr. Financial Planner
Read more

William N.
Wealth Advisor
Read more

Jack W.
Sales Associate
Read more

NexTrend Finance

LINKS
- Contact Us
- Locations
- Insights

CLIENTS
- Log In
- Sign Up
- Blog

CORPORATE INFO
- Careers
- Investment Plans
- Partner with Us
- Newsroom
- Meet the Team
- Services
- About Us

SUBSCRIBE

email address*

SUBSCRIBE