



Fogel Neale Launches Suite of Services for Those Seeking Fundamental Financial Guidance

NEW YORK, Aug. 1, 2011 /PRNewswire/ -- Fogel Neale Wealth Management is responding to an echo among prospective clients seeking counsel on fundamental matters beyond the realm of traditional financial planning, such as paying off debt and budgeting for monthly cash flow.

Fogel Neale gauged interest on a broader level through use of an online survey and the results revealed a strong, positive reaction. Over 50 percent of participants expressed an interest in working with a professional to organize their financial lives.

In order to better serve a wide range of needs outside of conventional financial planning, Fogel Neale is launching a specific suite of services, which will be provided through their new program, called the Personal CFO Plan.

The Personal CFO Plan offers individuals:

In-person meetings to discuss immediate financial needs

Assessment of financial situation and responsibilities, including bills, debt load, miscellaneous expenses, income, career path, and overall financial goals

Tax planning and preparation

Assistance with personal banking accounts, including suggestions to minimize unnecessary costs and maximize efficiency

Comprehensive budgeting for use in near-term financial planning

Overseeing the Personal CFO Plan is Michael Markiewicz, an experienced advisor, CPA, and CFP who has held positions at Deloitte & Touche and most recently, CBIZ MHM Family Office Services. He currently serves as a partner at Fogel Neale.

To learn more, visit www.fogelneale.com.

Fogel Neale Wealth Management

Fogel Neale Wealth Management, LLC, located in the heart of New York City's Financial District, was founded in 2009 on the premise of providing individuals, families, and institutions with unparalleled client service regarding personalized wealth management, financial planning, tax management, insurance services, and estate planning. To learn more, visit us at www.fogelneale.com.

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