

We are honored to be named among Washington, D.C.'s premier financial advisors and wealth managers for the third consecutive year

by the National Association of Board Certified Advisory Practices (NABCAP)

THE MONUMENT GROUP

at Wells Fargo Advisors

Our goal is simple: To help others succeed financially

Financial Management

Helping individuals and families who are saving for or transitioning into retirement or other major financial issues – e.g. buying a home or paying for their child's or grandchild's education.

Wealth Management

Helping individuals and families with asset levels that exceed the amount they need to live their lives comfortably, as well as trustees who have a fiduciary duty to oversee assets for the benefit of others.

Investment Management

We provide holistic and customized investment management solutions utilizing our Strategy Allocation approach. Investment management is central to our business as it impacts all of our clients – and the financial lives of many who don't even know us.

The Monument Group at Wells Fargo Advisors

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Evelyn Banks – Client Associate
Tripp Shreves - Managing Director – Investment Officer
Julie McIntire – Senior Client Associate
Matthew T. Carroccio – Vice President – Investment Officer

Since 1995, The Monument Group has helped a select group of private clients, families, and institutions with all aspects of their financial lives, providing customized wealth management and comprehensive planning solutions with the goal of bringing “best in class” service to our clients. We seek to establish long-term relationships built on trust, service, and attention to detail.

A CLEAR OBJECTIVE: We seek to maximize after-fee, after-tax, risk adjusted returns.

A FOCUSED APPROACH: We build relationships by listening, asking questions & listening again.

CUSTOMIZED SOLUTIONS: We implement tailored solutions to protect and grow our client's wealth.

It is our commitment to be there for our clients, diligently working in their best interests and offering a variety of specialized experience and perspective to help them succeed in all facets of their financial well-being. This is our commitment and is “The Monument Group Way”.

NABCAP's 2014 Premier Advisor evaluation and ranking program is an independent third-party assessment based on 20 categories of practice management; including experience, education, cost and investment planning. Participants are objectively compared and evaluated numerically. A minimum score must be attained for a practice to be considered for the final list, Winners are listed in alphabetical order. There is no cost for advisors to participate. The rating is not representative of any one client's experience and is not indicative of past or future investment performance.

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Investment in securities and insurance products:

ARE NOT FDIC-INSURED ► NO BANK GUARANTEED ► MAY LOSE VALUE

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