


CAPABILITY STATEMENT

About Wealth Advocacy

Wealth Advocacy is a consulting agency founded in 2017 with the mission to bring sophisticated experience and backgrounds to help diverse people, organizations, and institutions. With both local in market and virtual consultants our robust business model can gather and deliver world class specialized advice for our clients. We are a multifaceted and experienced group of advisors and consultants whose knowledge and combined experience provides expertise in a variety of areas such as cash flow analysis, financial oversight, budgeting, leadership practices, communication skills, interpersonal dynamics, enterprise value, and risk management. We are proponents and facilitators of stakeholder collaboration with the belief that this process will achieve the best result.

Core Competencies

-  Strategic Business Consulting
-  Retirement Planning
-  Risk Analysis and Management
-  Entrepreneurial Advisory Services
-  Real Estate Consulting
-  Income and Cash Flow Analysis
-  Sales Management Consulting
-  Benefit Plan Analysis

NAICS Codes:

- 541611** Administrative Management and General Management Consulting Services
- 523999** Miscellaneous Financial Investment Activities
- 531390** Other Activities Related to Real Estate
- 541612** Human Resources Consulting Services
- 541613** Marketing Consulting Services
- 541618** Other Management Consulting Services
- 611430** Professional and Management Development Training
- 921130** Public Finance Activities
- 923110** Administration of Education Programs

Past Performance:

- Completed Budget & Sales Projections for Investor Presentation.
- Ongoing Retirement Planning, coordinated with client's CPA to maximize savings and minimize tax implications.
- Strategic Corporate Consultancy to help focus start-up business on key performance indicators and next steps.
- Management Training for SMB to assist with implementation of new software system.

Featured Clients:

- **BL2, LLC**, a SDVOSB specializing in training and consulting for US Government Agencies, and private companies. 2019 - Present
- **CThru Media**, A Premier Digital Marketing Agency. 2018 - Present
- **Intuitive Municipal Solutions**, a software service provider to cities, counties, and other municipalities. 2018 - Present
- **GMAX**, International Lifestyle Brand Distributor. 2019 - Present
- **L&F Investor Services**, US EB-2 Visa and Business Consultancy. 2020-Present