A different kind of conversation. One that puts you in the center.

Not enough women have been leading the conversation about women and their finances.
This is why we created Her Wealth®.

The women at The Colony Group have a nearly unmatched breadth and depth of financial knowledge and expertise as wealth advisors, investment managers, tax professionals, divorce specialists and financial managers that act as outsourced CFOs for individuals, companies and foundations.

We are uniquely qualified to lead the conversation and transformation when it comes to women and their wealth.

We invite you to join the conversation at herwealth.com.

Check out our helpful guides, articles and resources designed to empower you.

You don't have to be a financial expert.

Our financial services are designed by women who understand that you have high expectations and even higher standards. We have them too. You want things done wisely and well, but you don't always have the time to take care of your finances yourself.

Our approach is collaborative – we work with you to create an investment and financial plan designed to help you live the life you imagine. Together, we focus on what's important to you and your family through an intentional process to build and sustain wealth.

Let us guide you from the fear of the unknown to financial confidence.

We see this time after time. When women have all the facts about their financial situation, it's an empowering experience. If you would like to speak with us about creating an intentional financial strategy for you and your family, we invite you to contact us.

To arrange a call or appointment, please call Lisa Poff at 301-656-1200.

Join the Conversation at herwealth.com

To learn about ALL of our Services, please see the opposite page.

The Colony Group

OUR SERVICES

Wealth Management for You and Your Family

From day one, we take a deep and genuine interest in you and your family. We come to understand your values and goals in order to create a financial plan and investment strategy that reflect your greatest desires, then map out a realistic path designed to achieve them. We build a diversified portfolio for you based on intelligent strategies and offer comprehensive investment solutions.

The value we add is fully realized over time. We are here with the advice and guidance you require at every stage of life. And because we are fiduciaries, our interests are aligned with yours. We wouldn't have it any other way.

Women in Transition

Life changes—positive or negative—can be stressful. Getting a divorce, losing your spouse, receiving an inheritance, starting or selling a business or approaching retirement are situations that most of us face just once in our lives.

We have been through these life events not once, but many times with many clients. Our experience and expertise prepare you financially to move on to the next phase of your life with confidence.

Tax Advice and Preparation

The largest bill you will pay over your lifetime is your tax bill. That's why tax advice and preparation should be an integral part of your overall wealth and financial plan.

Our CPAs and tax professionals have specialized expertise with partnerships, corporations and nonprofit organizations, as well as complex individual returns, including multi-state returns. Our financial advisors and financial management professionals work closely to maximize your net income while meeting your legal responsibilities.

Your Personal CFO

You may not have the time, expertise or desire to manage your day-to-day financial affairs. Or, you may need help managing the finances of an aging parent. Whatever the circumstance, we want you to consider us your personal CFO. Our bill-paying, budgeting and cash flow management services take the burden off of you and provide a total financial management solution.

Financial Management for Your Company

Your company's success depends on the decisions you make every day. You can depend on us to help you maximize your organization's financial performance. With our skill, knowledge and years of experience, we have the ability to serve as your dedicated treasurer, CFO, controller and human resource administrator, all bundled into one cost-efficient solution.

Are you ready to learn more? We would love to speak with you.
Please contact Lisa Poff at 301-656-1200 to arrange an appointment.