What Makes us Unique to Our Clients

We never stop growing up and neither do our clients.

At SAGE Private Wealth Group, we empower our clients to continue growing into the best versions of themselves. We help manage their resources.

“This frees our clients to pursue noble intentions, leave this world a better place, enrich the lives of all they touch and serve as a catalyst for the greater good while allowing them to grow into the best version of themselves and create a lasting legacy,” says CEO and Managing Partner, Khaled Taha.

“SAGE accomplishes this by actively listening and understanding not only who you are, but who you aspire to be. We then take these goals and translate them into a concise plan that allows you to achieve the results of your dreams.”

Most wealth managers create their plans by looking at three factors in their clients’ lives. SAGE Private Wealth Group develops your plan by examining FIVE different areas of your life:

1. Financial Life Planning: We help you plan your life - not just your finances. Our certified financial planners actively listen to your dreams and goals. The role of Comprehensive Financial Life Planning is more than managing investments, creating a retirement plan and occasionally checking up on a portfolio. SAGE also looks at potential events that can impact your long-term financial security. We do not stick to a plan just out of emotional attachment. We monitor your portfolios and adapt our strategies over time. This allows us to anticipate the constant changes in your financial life. An effective financial plan is not a one-time event; it requires growth and change so that you can live the life you envision for yourself and your family.

2. Investment Management: We learn what is most important to our clients. SAGE subscribes to the tenets of Modern Portfolio Theory. Through our Investment Committee, we apply intellectual capital and methods to each stage of the investment process. Our independent status means SAGE is not confined to a particular research firm, investment manager or asset class. We make our investment decisions based on the highest quality information, without conflict of interest. The members of our Investment Committee have decades of professional experience in financial services and capital markets. They have a wealth of experience in assessing the fundamental and behavioral impacts of changing market conditions.

3. Client Services: SAGE’s client-centered approach means we provide exceptional service that our clients not only expect, but deserve. We believe that our client's needs always come first, and seek to build long-term relationships through attentive listening. We aim to empower our clients with the tools and education to help get them where they want to go. Our goal is to provide a client experience based on trust, mutual respect and continuous communication, and so we strive to keep our clients informed and educated every step of the way.

4. Navigating Through Life: Life is a constantly-evolving journey that presents clients with many different challenges. Some of these challenges are normal, predictable life transitions: stages of life that we enter and leave over time. These changing stages lead to developments that require us to adjust financial plans, portfolios, and other strategies. Other events in life are unexpected, both positive and negative, and every client must adapt to them. Part of our role at SAGE is to pay attention to events in our clients' lives and interpret them from the perspective of what we are doing and what we might need to change. Then, we must provide our clients with the best possible advice about navigating those changes.

5. Coaching: "The biggest value we add for our clients is translating the intangible goals they have for themselves into a workable plan," says CEO and Managing Partner, Khaled Taha. SAGE believes every client can benefit from an advisor who acts as a counselor for the client when they are concerned about market changes. We pride ourselves on our reason and calm in the face of volatility, and understand that our clients may have concerns and questions. We remain prepared to advise clients at all times -- in uncertain periods of market decline, as well as periods of excitement and euphoria.

SAGE empowers clients to be the best versions of themselves by helping them to manage their resources that enable them to do that. Please visit Our Services page to view a list of the services we provide our clients.