4TH GEN WEALTH MANAGEMENT

For Immediate Release

New name & we are open!

(REPRINT)

Levy, Daniel & McGee Wealth Management, LLC is now **4thGen Wealth Management, LLC**

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LODI, CA – (LODI NEWS SENTINEL) – Levy, Daniel & McGee Wealth Management, a dynamic wealth management firm based in California, is pleased to announce that the company name has changed to 4thGen Wealth Management, LLC aka **4thGen Wealth Management**. As previously announced to clients, the firm name officially changed on April 13, 2021 as part of the evolution of this growing firm. The new name and logo represent a models-based practice that is focused on multigenerational wealth management beyond a family's fourth generation of heirs. Inherited wealth is typically spent or lost by the third generation. This is not a new concept, as the Chinese Proverb explains "wealth does not pass three generations." Put another way, the first generation makes it, the second enjoys it, and the third squanders it. The firm wants to help solve this issue and ultimately, help affluent clients maintain a financial roadmap so that their money can survive and grow for the fourth generation and to future grandchildren yet to come.

Their wealth managers focus on helping build family or corporate wealth, manage, preserve and transition assets for business owners and individual investors nearing retirement in their career. Dudley McGee, Executive Member/Wealth Manager states "advisors here share in the support and servicing of all collective clients, resulting in a higher level of service and increased value to address the broad range of one's financial needs".

4thGen Wealth Management will be hiring additional associates to support the firm's rapid growth. There will be more bulletins added to our website regarding job postings and details. The expanded service offerings and tools made available to potential and existing clientele will be utilized by current and new team members for more support.

Furthermore, we would like to announce that the Lodi office location is now open and fully staffed with our pre COVID-19 office hours. Focused on customer service, phone calls are answered by live people, old fashioned as that may seem. Open M-F 7:30 – 3:30 for primary business hours, appointments are recommended to meet with one of the Wealth Managers. The State of California has updated mask restrictions and waived the indoor requirements for those that are vaccinated, therefore this office has relaxed COVID -19 requirements accordingly. Masks and sanitizer are available in the lobby and are optional. Just ask at the reception desk and these items will be provided upon request. Be assured that the firm is fully committed to addressing any visitor's needs regarding COVID-19.

Also available free to clients are more of the sterile "Travel Kits" including masks, hand wipes and head rests. Before supplies run out, just ask the receptionist or call in to reserve one for your next visit. "It is such a relief to not have to use the face masks indoors anymore. I received my second vaccine shot in April and have enjoyed having our wealth managers back in the office full time. 4thGen Wealth Management is a wonderful office environment and much more lively compared to 2020," said Donna Robbins, Senior Client Associate. Appointment times for retirement planning and estate planning are filling up, so call or email 4thGen Wealth Management today. There will be more announcements and new materials made available on the new website (www.4thgenwealth.com). Updates to the website and new resources are forthcoming, so check back often.

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About 4[th]Gen Wealth Management, LLC

4[th]Gen Wealth Management is an independent and full-service wealth management firm. We specialize in high-net-worth intergeneration wealth management and transfers. We provide financial planning strategies, retirement income, and models-based portfolio management, while incorporating asset protection through a variety of financial products and investment services.

The team was formed in 2012 and moved from a Stockton location to our Lodi headquarters in 2015. We aligned with LPL Financial, LLC in 2018 for brokerage and clearing services and then changed our firm name to 4[th]Gen Wealth Management in 2021. 4[th]Gen Wealth Management is currently seeking additional clients as well as other registered advisors nearing retirement to join our growing team. Our process-based approach utilizing technology is searching for advisors eager to grow, but on their own terms, supported by an experienced operations staff. Please contact one of our executive members for further details and to gain access to our registered advisor only web site.

Our wealth managers are registered representatives with, and securities and advisory services are offered through LPL Financial, a Registered Investment Advisor, Member FINRA/ SIPC. 4[th]Gen Wealth Management and LPL Financial are separate entities. See our website at www.4thgenwealth.com for more information.

MEDIA CONTACT:

Corey N Daniel, Executive Member/Wealth Manager
209-263-0330
corey.daniel@4thgenwealth.com