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Moving Forward Together

Williams & Townsend Wealth Management Partners serves as a trusted advisor to high net worth clients by offering personalized service and education.

In an ever-changing global economy, successful wealth management requires more diligence and expertise than ever before. High net worth individuals need specialized advisors with the skills to navigate today's market and effectively plan for tomorrow.

Enter Williams & Townsend Wealth Management Partners, where managing directors Steven G. Williams, CPFA, CRPC®, CFP®, Kevin S. Townsend, CFP®, CRPC®, CPFA, and their team have the education and experience needed to grow and transition wealth between generations. With decades of experience, they serve as trusted partners for life's many transitions, decisions, and questions.

"We help clients make the best use of their wealth during their lifetime and ensure that wealth endures for the generations, but we're more than just wealth managers: We're a single-source advisor and networking resource," explains Townsend. "When clients want to send a child to college, buy a luxury vehicle, sell a business, create structured philanthropy, or find an attorney or surgeon, we're their first call."

Planning Through Transitions

"Our move to Raymond James was entirely for our clients' benefit," says Williams, a second-generation wealth manager with a three-decade career. "Like us, Raymond James values people first, boasts a long history of strength and stability, and embraces methodical decision-making and comprehensive, long-term planning. The firm's values and extensive resources set our clients up for continued growth and success."

The practice now has more assets under management than prior to the move, an achievement Townsend attributes to mutual trust, integrity, and—above all—personal relationships.

"We have longstanding client relationships that are impossible to replace," he says.

Clients' loyalty extends beyond business, too—working with Williams & Townsend is often a multigenerational family affair. "We are dedicated to assisting families as they grow," Williams explains. "We've now created goal-focused wealth management strategies for third and fourth generations."

While proud of past achievements and client longevity, the Williams & Townsend team values continued education. "We never stop learning," says Townsend. "We'll walk clients through their financial plans in as much detail as they desire."

This client-centric philosophy is successful in its own right; both managing directors have been named *Forbes* Best-In-State Wealth Advisors in 2018, 2019, 2020, and 2021. But they say real rewards come from seeing clients fulfill goals.

"We're passionate about our clients achieving everything they envision in life," says Williams. "This is more than a job; it's a calling. We're helping people reach their dreams."

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