SHANNON LEIGH

MEET THE WEALTH MANAGER

Where Experience Meets Innovation in Wealth Management

With more than 31 years' experience at Merrill, Adam Goldman brings his clients both a trusted knowledge of the industry and a forward-looking approach to wealth management.

Adam Goldman's roots at Merrill were laid in 1985, when, at age 15, he would bike to the local office and assist a financial advisor with office chores. His fascination with research—how it affected investments and a client's overall plan, inspired him to intern there while a student at Dickinson College. In 1990, after graduation, he joined Merrill full time and built his career in the Blue Bell, PA, office.

Today, Goldman is a Merrill Senior Vice President, Wealth Management Advisor. Through the Goldman Group, he works with high-net-worth clients to help them pursue the lifestyles they desire. "I've lived through the good and bad over the past three decades, and use my experience to my clienteles' advantage," he says. "I remain current and engaged. As the markets, the brand and the experience change, I have continued to evolve, learn and still love what I do."

DIGITAL EXPANSION & COVID

Experience has taught Goldman that clients today are concerned with higher taxes, changes in the estate tax and navigating the capital markets. They also want a firm that innovates in response to a challenge. Merrill did just that—evolving their technological capabilities more in the first three months of COVID than in the three years prior. In addition to being able to connect with an advisor virtually, clients now have access to a secure digital document vault and My Financial Picture®, which gives them a single view of budgeting, spending and investing. Merrill also launched a digital wealth management overview, replacing complicated hard copy summaries with an interactive video format. This helps you to access all your information anytime, anywhere, providing you with a whole new level of convenience.

For more information about The Goldman Group: Adam S Goldman, CDFA®, CPFA, CRPC®, CIMA®, Senior Vice President Wealth Management Advisor, 470 Norristown Road, Suite 101, Blue Bell, PA 19422; 484-530-5312