

# About Nova Wealth

Building lasting wealth through trusted expertise, personalized strategies, and unwavering commitment to our clients' financial success.

## Our Story

Founded in 2010, Nova Wealth LLP emerged from a simple yet powerful vision: to democratize access to sophisticated wealth management strategies that were traditionally reserved for institutional investors.

Our journey began when our founding partners recognized a significant gap in the financial advisory landscape. Too many individuals and families were receiving generic advice that failed to account for their unique circumstances, goals, and values.

Today, we serve over 500 families across the nation, managing more than \$2 billion in assets. Our growth has been driven not by aggressive marketing, but by the trust and referrals of satisfied clients who have experienced the Nova Wealth difference.



**\$2B+**  
Assets Under Management



**500+**  
Families Served



**13+**  
Years of Excellence



### Our Mission

To empower individuals and families to achieve their financial aspirations through personalized wealth management strategies, comprehensive planning, and unwavering fiduciary responsibility. We are committed to building lasting relationships based on trust, transparency, and exceptional service.



### Our Vision

To be the premier wealth management firm recognized for our innovative approach, ethical standards, and the measurable impact we create in our clients' lives. We envision a future where sophisticated financial strategies are accessible to all who seek to build and preserve wealth.

## Meet Our Team

Experienced professionals dedicated to your financial success



**Michael Chen**

Managing Partner & CEO

CFA, CFP® - 20+ years experience in wealth management and investment strategy



**Sarah Williams**

Senior Partner

CFP®, ChFC - Specializing in estate planning and tax optimization strategies



**Sarah Williams**

Senior Partner

CFP®, ChFC - Specializing in Tax planning and tax optimization strategies

## Ready to Meet Your Advisors?

Schedule a complimentary consultation to discover how Nova Wealth can help you achieve your financial goals.

[Schedule Consultation](#)[Download Our Brochure](#)