

TRUST

Entrusting your relationships to us is something we don't take for granted

TRUST IS THE BASIS FOR OUR IDEAL RELATIONSHIPS AND ALLOWS US TO DO OUR BEST WORK.

Like us, you have spent your career building relationships through attentive listening, keeping promises, and unwavering commitment.

What we provide

The Investors Center provides a proactive environment for those interested in creating a framework for success. Our work begins by aligning our clients' aspirations with the support and skill required to realize those aspirations. Creating this alignment is, rather than a one-time event, an ongoing conversation about clients' evolving financial needs and changes in life circumstances.

Who our clients are

A perfect client for The Investors Center is someone who has had less than ideal experiences with their financial advisors and has high expectations about working with a new advisor. Prospective clients also include people whose income, assets, and obligations necessitate consultation and management from a highly skilled, responsive, and experienced professional. The ideal time for a conversation with us is before any significant financial action is taken or following an important life change.

Extend your reach

We invite you to get to know our nationally recognized firm, and to learn how we can work with you as a valuable extension of the relationships you have worked so hard to build.

If you know someone who needs to have a conversation with us, please pass along the information that we have included and let us know how we can contact them.



Eliot M. Weissberg, CFP®, CFS
President



Kathleen A. Weissberg, CFP®
Managing Director

Led by Eliot M. Weissberg, CFP® and Kathleen A. Weissberg, CFP®, our team makes available a wide array of financial services to accommodate the needs of clients with considerable investment assets and complex situations.

Our relationship with our clients is further strengthened by our relationship with Raymond James Financial Services, Inc. While we are independent and work only for our clients, our relationship with this respected financial institution provides access to state-of-the-art resources.

Securities offered through Raymond James Financial Services, Inc., Member FINRA/SIPC.
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70 East Main Street
PO Box 1447
Avon, CT 06001

Voice: 860.677.8808
888.456.0203
Fax: 860.677.8801