



Lenehan Wealth Management Group

We are a unique team of engaged wealth managers and client service professionals, driven by four strong core beliefs.

1 Investing is best done with psychological insight, discipline and coaching.

We believe the greatest value we bring to our clients is psychological insight, based on our knowledge of human behaviour and its impact on financial decisions.

It's all about maintaining balance. If you're excited by a windfall, afraid of a downturn, or emotional in other ways, we will have a discussion to help bring you back to balance and avoid making regrettable decisions.

Integrity is the cornerstone of our team's values. This means we tell our clients what they need to hear, not necessarily what they want to hear. We will do this even if, what we say creates conflict in the short term.

2 Income-oriented, value-focused investment strategies give you patience

The families we advise expect a consistent, regular income for the use of their capital – they want a steady stream of reliable cash yield which is independent of fluctuations in the markets.

3 Affluent investors need a highly collaborative, family office approach.

High net worth investors seek collaborators, not “yes people.” We work closely with affluent families and business owners, acting as disciplined behaviour coaches to keep them on track when they venture out of their own area of expertise.

Our belief in the ultra high net worth family office offering integrates the efforts of your legal and accounting professionals and estate and business succession planners to address the many interrelated complexities of significant wealth. Our goal is to deliver beyond the expected and put clients first and we believe our service is unsurpassed.

Intergenerational wealth management is a major focus of our practice. We can attend to the needs of all members of your family, both young and old.

4 An informed investor is a confident investor.

We understand that you're not an expert in wealth management. That's why you hired us. Over the years, we have learned that the more our clients know and (more importantly) understand what we're doing for them, the more confident they feel.