

Who We Work With

Tech & entertainment professionals and entrepreneurs often have complicated financial lives. High rents, steep childcare costs, confusing equity compensation and hefty federal, state, and local taxes are often a given. Our vast experience in this industry allows us to help you deftly navigate these financial challenges.

We work closely with you to discover your goals and needs and use that information to craft a customized plan created specifically for you. Since we know how busy life can get, we offer a variety of ways to meet, in-person or virtually. And we offer unlimited email support, so we are always here when you need us.

Comprehensive Approach



Financial Planning

Everyone has different personal and professional goals. We work closely with you to develop a custom financial plan tailored specifically to your goals and designed to help you live a life of financial freedom.



Tax Planning & Preparation

Professionals are often hit especially hard by federal and state taxes. We use tax mitigation strategies, coupled with ongoing tax preparation to help you maximize your tax savings.



Investment Management

We design and manage a customized investment strategy that aligns with your unique financial objectives, time frame, and risk tolerance.

How We're Different



Holistic Services

We provide tax, financial planning, and investment management under one roof.



Stock Compensation

We specialize in equity compensation—and its unique tax implications.



Fee-Only

We have your best interests in mind. As fiduciaries, we don't work on commissions or accept kickbacks.



Seamless Communication

We utilize technology so that we can work remotely with busy clients.

Pricing

The fee for Ongoing Financial Advising is comprised of a financial planning base fee plus an asset management fee.

Financial planning base fee: The base fee is \$9,000 per year and covers development of a financial plan, ongoing financial planning meetings, individual tax preparation, ongoing tax planning and an annual tax projection.

Asset Management fee: The asset management fee is calculated as a percentage of assets that we manage. Asset management services include integration of the investment portfolio with your financial plan, reporting and goal tracking, tax-efficient rebalancing and tax-loss harvesting, and behavior coaching.

Assets Under Management	Annual Fee
\$0 - \$5M	0.35%
\$5M and over	0.25%

Pricing Examples

A client with assets under management of \$2,000,000 would pay an annual fee of \$9,000 base fee + (\$2,000,000 x 0.35%) or \$9,000 + \$7,000 = \$16,000.

A client with assets under management of \$6,000,000 would pay an annual fee of \$9,000 base fee + (\$5,000,000 x 0.35%) + (\$1,000,000 x 0.25%) or \$9,000 + \$17,500 + \$2,500 = \$29,000.

Who We Are

Greg Meyer, certified CPA and CFP®, (right) started his career at Deloitte Tax & Bernstein Wealth Management, where he advised high net worth individuals. He later founded New Wave Financial Services to create comprehensive financial strategies for his clients that went beyond tax preparation.

He saw the inefficiency that clients experienced when working with multiple financial professionals, and wanted to create a full-service financial firm for the tech & entertainment professional, available at reasonable rates.

