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# FINANCIAL SERVICES REVIEW

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**CS TOMASI Wealth Management**

# CS TOMASI Wealth Management

## Empowering Clients through Personalized Wealth Management

CS TOMASI Wealth Management has been a trusted name in financial planning and wealth management since 2017.

Founded by an experienced professional in tax and accounting services, the firm has grown organically, built entirely on client referrals. Over the years, it has expanded to offer comprehensive wealth management solutions focused on disciplined growth, tax efficiency, and long-term financial security.

"Our ethos centers around client relationships, trust, and the pursuit of long-term financial success, without compromising on ethical standards or personalized service," says Christiane Tomasi, Principal and CEO.

### The Journey of Organic Growth

The story of CS TOMASI Wealth Management is rooted in organic growth.

Its foundation in tax and accounting created a natural bridge to wealth management, as clients sought investment guidance from an advisor who already understood their financial position. By integrating tax and investment planning, the firm helped clients avoid costly tax mistakes, strengthening credibility and generating continued referrals.

This referral-driven growth allowed the firm to expand without advertising, relying instead on long-standing relationships and effective results. In-house portfolio management and a disciplined, conservative investment philosophy further reinforced client confidence.

What began as a small tax and accounting service has evolved into a full-service wealth management firm offering financial planning, retirement strategies, investment management, and comprehensive tax planning.

"We work with individuals and families, helping them plan for the future, work to grow their wealth in pursuit of achieving their financial goals," says Tomasi.

### Client-Centered Philosophy

The firm's client-first approach begins at the very first interaction, whether in person or virtually.

"Every client's financial journey is unique, and so are their financial strategies," says Tomasi. "We take pride in working with clients who align with our values, creating a mutually respectful partnership."

CS TOMASI Wealth Management focuses on building long-term relationships tailored to each client's goals, challenges, and financial aspirations. Rather than inheriting portfolios without context, the firm works with clients from the beginning—helping them open accounts, structure investments, and build strategies designed to accumulate and preserve wealth over time.

The approach emphasizes thoughtful planning, disciplined decision-making, and long-term growth.

Recognized for its commitment to integrated tax and financial planning, the firm ensures that tax implications are considered as part of every strategy. By aligning tax planning with investment decisions, CS TOMASI strives to help clients retain more of their wealth over the long term.

Christiane Tomasi,
Principal & CEO

> Our ethos centers around client relationships, trust, and the pursuit of long-term financial success, without compromising on ethical standards or personalized service.

## Following a Disciplined Investment Strategy

CS TOMASI Wealth Management's investment philosophy is grounded in careful research, market understanding, and disciplined execution, all managed in-house. Decisions are not driven by short-term market fluctuations but by thorough analysis and long-term objectives.

This approach allows greater control over portfolios so that strategies align with each client's goals and risk tolerance.

The firm emphasizes steady, cost-conscious investing across stocks, ETFs, and mutual funds. For clients approaching retirement or seeking additional stability, strategies often incorporate dividend-paying equities and fixed-income investments to provide reliable income. Clients are guided through market cycles with a focus on maintaining discipline and adjusting portfolios thoughtfully when necessary.

## Retirement Planning and Longevity

Retirement planning represents a significant portion of the firm's work. Many clients seek guidance as they transition into retirement or begin preparing for it. CS TOMASI Wealth Management develops retirement strategies designed to be sustainable, tax-efficient, and aligned with long-term needs.

Rather than relying on standardized retirement models, each plan is tailored to the individual. The firm assists clients in evaluating appropriate retirement vehicles—including IRAs, 401(k)s, and other investment accounts—while structuring diversified income streams.

Strategies may include non-retirement investment accounts and dividend-paying assets that provide dependable income. In addition, the firm offers annuities with living benefit riders when appropriate, helping create guaranteed income streams that are less exposed to market volatility. These measures are designed to address longevity risk and provide clients with greater financial confidence in retirement.

## Commitment to Client Success

A defining characteristic of CS TOMASI Wealth Management is its commitment to helping clients achieve measurable financial progress. The firm's leadership and staff remain focused on disciplined planning, careful investment selection, and comprehensive retirement strategies.

With continued emphasis on tax optimization, long-term growth, and risk management, CS TOMASI Wealth Management remains dedicated to providing clients with the tools and strategies necessary to pursue lasting financial security. Fs

# Certificate

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## CERTIFICATE OF RECOGNITION

CS TOMASI Wealth Management

This document serves as formal certification that **CS TOMASI Wealth Management** has been recognized by the Editorial Board of **Financial Services Review** as

TOP WEALTH MANAGEMENT SERVICE 2026

**EDITORIAL ATTESTATION:**

The Editorial Board attests that the selection of CS TOMASI Wealth Management was conducted via a bona fide editorial process. Selection was based on a proprietary methodology evaluating service innovation, regulatory & operational standing, market influence & thought leadership and client-centric metrics.

**COMPLIANCE SUMMARY:**

- Methodology: Independent Editorial Research & Peer Review.
- Compensation: No "Pay-for-Placement" fees were accepted.
- Conflict Disclosure: The recipient has the option to license the award logo and purchase reprints for marketing purposes. Such a transaction is independent of the editorial selection.

Jeff Rodriguez

**Jeff Rodriguez,**
Editor-in-Chief,
Financial Services Review

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