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LifeTime Asset & Tax Management Expands to Wilmington, North Carolina

Raleigh, North Carolina (October 1, 2024) – LifeTime Asset & Tax Management, an award-winning wealth management and tax planning firm, has expanded into the Carolina coastal region with an office location based in Wilmington, NC. This expansion marks LifeTime's third office location, as the company is headquartered in Raleigh and has an office in Suwanee, GA.

As a central part of this expansion, Bruce Moskowitz, a long-time Wilmington resident and business owner, has merged his sizeable wealth management practice with LifeTime and will lead the new LifeTime Wilmington office. Moskowitz has worked as a Financial Advisor for over 30 years. His passion for finance began as a student at the University of Georgia, which led him to a successful career as a Financial Advisor, and later he built a thriving wealth management practice in Wilmington, his hometown. His support staff including Lori Williams, Jessica Sjolander, and Julia McCracken, will join LifeTime with Moskowitz.

For several years, Moskowitz and Matt Glova, CFP® and CEO of LifeTime, discussed a partnership as they recognized their shared goals and approach to financial planning. Both are committed to helping clients pursue their financial goals through comprehensive wealth management, reducing financial anxiety, providing proactive future planning, and ultimately allowing clients to retire with confidence.

"The addition of a LifeTime office in Wilmington makes perfect sense," said Glova. "I have known Bruce for many years. His experience and dedication to his clients align with LifeTime's philosophy. We're excited to partner with Bruce and his team to expand our services to the Wilmington area."

"I'm pleased to merge my business with LifeTime and join the company as a Wealth Consultant and Managing Partner. This collaboration allows me to bring my clients greater support as the business continues to grow, as well as experience in more specialized areas of the industry," said Moskowitz. "LifeTime's integration of asset management with tax planning is a unique offering and will be a valuable addition for our existing and new clients in Wilmington."

Moskowitz and Glova look forward to many years of successful partnership and the opportunity for LifeTime to serve clients in the Wilmington area and coastal region.

About LifeTime Asset & Tax Management
LifeTime Asset & Tax Management has been providing individuals and organizations with financial guidance since 1996. LifeTime's new Wilmington office is located at 2715 Ashton Drive, Suite 102, Wilmington, NC 28412. The firm helps clients by simplifying wealth management and investment complexities, aggregating every aspect of their finances, and clarifying their goals and choices. LifeTime

employs 14 financial professionals, including 11 CFP®s and 3 CPAs with more than90 years of combined experience in the financial industry. A tax department was added to the firm in 2020. The tax team provides tax return preparation and bookkeeping services. Together, LifeTime's asset and tax management teams work to provide comprehensive tax and financial services. Learn more at www.lifetimeasset.com.

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