Phone:

Our Process

The role of the Crawley Wicker Johnson Wealth Management team isto provide stewardship and oversight as you pursue your financial andlife goals. Our process includes:

- Listening carefully to you regarding goals, risk tolerance, andtime horizon.
- Creating an investment and asset allocation strategy as the basisfor advice, taking into consideration your financial goals.
- Providing a team approach to investment research and selectionprocess for stocks, bonds, mutual funds and outsideprofessional money managers. We are also backed by anextensive network of industry experts who provide fundamental and technical research on securities we select in designingcustom investment portfolios.
- Conducting regular portfolio reviews and responding to changesthat may call for adjustments and updates to your investmentplan. All clients receive a complete financial review periodically.
- Coordinating as needed, with your other professional advisorsincluding your CPA, attorney, and in some cases, your insuranceagent.

Risk Management

We have the experience and flexibility to help you establish andadminister a sound endowment policy based on a commitment to keyprinciples, including:

- Establishing an asset allocation and spending policy that iscompatible with your goals and needs
- Understanding the components of risk and deciding onacceptable parameters
- Diversifying to increase return and reduce overall portfolio risk
- Access to leading professional portfolio managers