investor.com

Ogorek Wealth Management

TRUST SCORE

97%

Ogorek Wealth Management, federally registered in 1983, is a Registered Investment Advisor (RIA) in 3 state(s) with a licensed staff of 4 advisors. Ogorek Wealth Management manages $371.1 million and provides investment advisory services for 194 clients (1:49 advisor/client ratio).

Ogorek Wealth Management requires a $500,000 minimum investment.

BENEFITS

Firm does not have any felony convictions (Impact:High)

Firm does not have a disciplinary history (Impact:High)

Firm uses a transparent fee-only model (Impact:High)

Firm has been federally registered for 36 years (Impact:High)

Communications sent to the firm's website are secure and encrypted (Impact:Medium)

Firm does not have any misdemeanor convictions (Impact:Medium)

Firm does not have an insurance agent conflict (Impact:Medium)

Firm does not privately manage or own the products they recommend (Impact:Low)

Firm does not offer proprietary products (Impact:Low)

Firm does not have an attorney conflict (Impact:Low)

CONSIDERATIONS

Firm has less than $1B in assets under management

BENEFITS (cont.)

Firm does not perform side-by-side management (Impact:Low)

Firm does not receive soft dollar benefits (Impact:Low)

Firm provides mobile-friendly experience for their clients (Impact:Low)

CONSIDERATIONS (cont.)