

Point View Wealth Management Presents to Rotary Club of Summit–New Providence on 'The Top 5 Questions Investors are Asking Today'



Point View's David Dietze addressing the crowd at the Rotary Club of Summit-New Providence.

David G. Dietze, JD, CFA, CFP, Founder and President of Point View Wealth Management presented to the Rotary Club of Summit-New Providence, along with John Petrides, MBA, Managing Director and Portfolio Manager of Point View, on “The Top 5 Questions Investors are Asking Today,” at the Grand Summit Hotel, in Summit, NJ on June 1, 2015.

Point View discussed the major issues that investors are dealing with in today’s current environment and offered solutions on how to best position portfolios. A complete set of slides from the presentation can be viewed on Point View’s website, ptview.com.

Point View Wealth Management, Inc. works with families, providing customized portfolio management services and comprehensive financial planning, to develop and achieve their financial goals. We are independent and fee only. How can we help you? Contact David Dietze (ddietze@ptview.com), or Claire Toth (ctoth@ptview.com), or call [\(908\) 598-1717](tel:9085981717) to learn how.

CNBC has named Point View number 5 on its list of the top 100 American fee-only wealth managers.