

**Nicole Katav**

Financial Advisor
College Unit Director

nicolekatav.nm.com

nicole.katav@nm.com

875 3rd Ave Fl 23

New York, NY 10022

P 212.867.8057 | C 347.684.2719

F 212.208.4303

I am first generation American and I am the Financial Advisors I wish my parents had when they came to the US. I help people navigate their employee benefits and fill in any gaps that will allow them to achieve their financial goals as well as protect their families.

PROFESSIONAL SPECIALITIES: Financial Planning, Wealth Management, Disability Income Planning, Life Insurance Planning, Investment Strategies, Retirement Planning, Education Planning, Estate Planning, Long Term Care Planning

BUDGETING

Creating the right financial habits is crucial to helping ensure a successful outcome of your financial plan. In our opinion this starts with budgeting and creating the habit of saving, regardless of income levels. We want our clients to be prepared for the future and to already have a plan in place to implement as soon as their financial situation changes.

WEALTH MANAGEMENT

You've earned your success and continue to excel in your personal and professional lives. Maintaining wealth becomes an issue as time constraints in daily life make it difficult to identify and develop strategies that align with your financial goals. We will partner with you to help you sustain and grow long-term wealth consistent with your goals and aspirations, taking into account other financial needs and your comfort with market risks.