

Zeller Kern Keeps Financial Data and Planning in One Secure Place in Wealth Vault®

GOLD RIVER, CA -- (Marketwire) -- 08/02/11 -- Zeller Kern Private Wealth Management Inc., a comprehensive financial planning firm, today announced that they will be offering their Wealth Vault® service to clients who are looking to consolidate the viewing of all their financial documents such as checking/savings, 401k's, investments, insurance, deeds, wills in one safe and secure location.

Have you ever been in a situation where you needed a document that was stored at your home but going to get it would have been an inconvenience? Well, Zeller Kern has heard countless stories where people were in situations just like this. Whether it was a son/daughter who got an emergency phone call from the hospital notifying them their parent had to be rushed to the emergency room and the hospital needed insurance verification. Or, a person who was traveling and left their financial documents at home but want to check their earnings on an investment.

Hearing stories like these made Zeller Kern come together and evaluate the services offered to clients and find ways to simplify clients' lives. This is why Wealth Vault® was introduced and is designed to be an integrated program that allows clients to access all of their important financial documents in one place. Whether you are interested in viewing your Zeller Kern portfolio or viewing outside accounts such as checking/savings, 401k's, investments, insurance, deeds, wills or other documents, the aggregated portal in Wealth Vault® allows you to view all your documents in one safe and secure online location.

Wealth Vault® is an exclusive service offered by Zeller Kern that allows clients not only ease of access to all their financial documents, but also gives clients the ability to link their accounts and view up to the minute account balances on their computer or smart phone, create reports to analyze cash flow, balance sheets, planning goals and much more. To learn more about this exclusive service contact us at 916-436-8270.

Zeller Kern Private Wealth Management Inc. is a comprehensive planning firm that partners with individuals and families, business owners and physicians to provide solutions for their wealth, businesses and practices. Zeller Kern works closely with business owners to build the value of their company and provide business exit plans to achieve top dollar for the owner in the most tax efficient way. Zeller Kern also developed a reputation in the industry for their active investment portfolio management style through their discretionary investment discipline, known as "Advance and Preserve", which is designed to anticipate major trends and take action before they occur.

This communication is strictly intended for individuals residing in the states of AR, AZ, CA, FL, GA, IL, IN, MO, NJ, NV, OR, TX, and WA. The financial consultants of Zeller Kern are registered representatives and investment adviser representatives with and offer securities and advisory services through Commonwealth Financial Network, Member FINRA Financial Investor Regulatory Authority / SIPC Security Investor Protection Corporation, a registered investment advisor.