Wealth Management

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Our Approach to Wealth Management

For over 160 years, Comerica has navigated fluctuating economic cycles and provided financial advice to generations of clients. Whether you've had significant assets for many years, or are experiencing sudden wealth, complex issues surround affluence. Effective wealth management is not just about investments, it involves a coordinated approach to address multiple issues such as: liquidity needs both short- and long-term, insurance coverage, estate planning, philanthropic wishes, and family dynamics. As each person and every financial situation is different, Comerica Wealth Management offers a multidisciplinary approach to wealth management that enables you to receive your advice from a team of skilled professionals in a way that works best for you.

Effectively Managing Wealth Involves a Team Approach

At Comerica, you'll receive your advice – from basic requests to advanced wealth planning techniques – from a team of professionals. We help to identify your needs, prioritize your goals, manage risks, and provide anything else you may need to meet your financial objectives. Your team works closely to evaluate your situation and provide a plan using a full range of lending, wealth planning, investments, and insurance tools. Guiding you through your individual plan of action, these wealth management professionals answer your questions and help you make informed decisions.

The key to executing your plan is to create a process that works for you. That's why we customize our approach so that it is tailored to meet your needs. For example, you may want to meet individually with each member of your team – which may include a private banker, insurance advisor, a trust officer and others. Some clients, however, prefer to meet with several or all of their team members together.

Our Unique Approach Allows Clients to Customize How They Receive Their Advice

At the core of your team is a highly experienced relationship manager who oversees your wealth management relationship. Having wealth can be overwhelming, as there are many issues you need to consider. Your relationship manager orchestrates your wealth plan and ensures all aspects of it are coordinated. Our goal is to build a long-term relationship with you to meet your financial needs.

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