Phil Weiss founded Apprise Wealth Management. He started his financial services career in 1987 working as a tax professional for Deloitte & Touche. For the past 25 years, he has worked extensively in the areas of personal finance and investment management. Phil is a CFA charterholder, a CPA, and an RLP®.

In addition, he has served as a featured media spokesperson, has written weekly commentary on market-related topics, and is a frequent podcast guest. He also continues to blog regularly for Apprise. His investment approach favors the long term, as well as assessing the value and fundamentals of the assets in which he invests.

He launched his own Registered Investment Advisor (RIA) business so he could provide financial planning, personal finance, and investment management services and education to women facing new beginnings. He believes it is a privilege to help others plan for their financial future. Please read this blog if you would like to learn more about what drove Phil to start Apprise and why he works with women facing new beginnings.

Phil grew up in Livingston, New Jersey and graduated from Rutgers University with a BS degree in Accounting. He also attended Duke University for three years where he was a Psychology major.

He and his wife, Diana, live in Maryland and are the proud parents of four children – six if you count their two dogs. Phil enjoys spending time with his family at home, on the fields, and traveling. He likes following his favorite sports teams, cooking, and reading, too. Phil also coached many of the youth sports teams his children played for.