WHY PARTNER WITH WPP

With over $2B in assets under management and advisement, WealthPLAN Partners has grown to become an industry leading Registered Investment Advisor by providing sophisticated financial planning and investment management services to Advisors and their clients. Headquartered since 1989 in Omaha, NE, WealthPLAN Partners is comprised of over 30 Advisors nationwide.

Their broad suite of products and services include:

- Partnership with over 30 like-minded Advisors
- Collaboration with multiple Chartered Financial Analysts (CFA®) and Certified Financial Planners (CFP®)
- Inclusion in the WPP Investment Committee
- Flexibility of investment options, with no proprietary products
- In-house Compliance team helps ensure the best interest of each client is maintained
- Lower trading fees
- Lower expense share classes
- IRA maintenance fees waived
- Alternative Investment maintenance fees waived
- Online performance reporting via a secure Client Portal
- Customizable technology providing state-of-the-art reports and financial planning tools

The best of both worlds: Advisors and clients maintain the feel of a small boutique and personal investment firm, while enjoying the benefits of a larger organization.