

What would you most like to  
**improve, develop, or change** in  
your financial life?

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It all starts  
**with a plan.**



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# How do you maximize the IMPACT of your wealth?



## Grow Wealth & Income

Access to better solutions to provide financial freedom to positively impact your family, business, and community. We offer customized, tried and true strategies to increase your wealth and retirement income. We have expertise in combining traditional strategies alongside alternative solutions like real estate, private equity, insurance and structured products.



## Reduce Risk

*“The single greatest way to compound capital is to avoid large losses.”*

– **Warren Buffet**

How do you best protect your wealth? There is no need for you to take unnecessary risks and by understanding your entire financial picture, we can provide risk-adjusted returns tailored to your goals and objectives.



## Lower Taxes

Keep more of your hard-earned money. Reducing taxes can have an enormous impact on your wealth plan. Taxes are one of your largest expenses and reducing them means more money for you, your family and your passions. We specialize in providing tax-efficient and tax-free income solutions most traditional firms don't utilize. It's what you keep that matters!

## FINANCIAL PLANNING

You most likely have existing competent advisors, such as attorneys, accountants, financial advisors, and insurance agents, who have helped you with a certain level of estate, business, and investment planning. Why then, would you choose to engage with us?

Most often it's the lack of coordination and the desire to take your existing planning to the next level. We provide a high-level approach, viewing your entire financial landscape holistically. We analyze your financial situation on a cross-disciplinary basis, rather than a single perspective. This allows us to identify significant coordination gaps and opportunities.

Our clients have found the difference between having this work done, and having it done as well as it could be, can literally mean hundreds of thousands, or even millions of dollars in added value to you and your family.

## INSURANCE

No one tells us they have too much tax-free wealth! Life insurance can provide valuable benefits DURING life as well as at death, and can accomplish results that aren't easily replicated. Whatever your needs, our solutions achieve more with less.



## INVESTMENTS

Our independence helps us allow you to become more financially independent, which means we are free to utilize the very best options for your portfolio. We don't rely on one approach and there is no "one size fits all" solution. We sit on the same side of the table as you, working on your behalf to achieve results fitting your unique needs and objectives. Rather than riding the stock market's roller coaster, we use a different approach with more flexibility and diversification. This is all with the objectives of growing your wealth and income, reducing your risk, and lowering your taxes.



## OUR IMPACT WEALTH PHILOSOPHY

- Every journey is unique.
- We listen and take the time to understand your needs.
- We make sure you feel supported and safe.
- We help protect your wealth and maximize the benefits.
- We strive to simplify the complicated.
- We partner with you to manage your finances, so they don't manage you.
- We are fiercely independent and continuously seek the very best solutions for you.
- We believe private capital is sacred and can be used to make a positive IMPACT on your world.

## WE'RE NOT JUST ADVISORS. WE'RE YOUR PARTNERS.

We take a teamwork approach to wealth management. You're always the focus and a key part of the team. We collaborate with you and your other advisors to help achieve your goals. Our success is measured by yours.

## BRINGING IT ALL TOGETHER IS WHAT SETS US APART.

Our clients know they can count on Impact Wealth to handle their financial situation, safeguard their personal information, and streamline the entire process. We have the expertise to manage your portfolio and coordinate your financial world, while ensuring you are on track to realize your life's dreams. It's an encompassing relationship that builds trust and inspires confidence.



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