CLIENT-FOCUSED

RESULTS-DRIVEN

INVESTMENT
PLANNING
ADVISORS

GROWING FORWARD TOGETHER

It takes time, patience and a supportive environment to produce a strong, healthy tree. The same elements are also essential to pursue a solid financial future for yourself and your loved ones.

The professionals at Investment Planning Advisors believe that wealth preservation and growth requires the guidance of a knowledgeable, experienced and caring financial professional who is committed to excellence and integrity. Whether you are still working and accumulating assets, preparing for retirement or experiencing the complexities of a major life change, you can trust our team to provide thoughtful, objective guidance and support.

With more than six decades of combined planning and investment experience, we are well equipped to help you navigate toward financial independence. Our goal is to become your most trusted advisor and to ensure that you are positioned to retire on your terms and enjoy the future you envision.

Like the deep roots that form the stable and enduring foundation of a mighty oak tree, laying the financial groundwork for you and your family is the key to growing a lasting legacy for future generations.

CULTIVATING YOUR FUTURE

Our mission is to manage and grow our clients' wealth through comprehensive financial planning and disciplined asset management. To fulfill this mission, we aspire to provide unsurpassed levels of service and to consistently exceed your expectations. We are driven to help you seek the results you desire.

As we take the time to discover what you hope to accomplish, our focus is on your goals and your unique financial situation. We create a customized, comprehensive plan that addresses your short- and long-term needs and takes into account your tolerance for risk.

The services we offer include:

Investment planning and asset allocation – Creating and managing a diversified investment portfolio, closely monitoring its performance and rebalancing or reallocating funds when necessary

Retirement planning and income distribution – Preparing before and during your retirement to help maximize capital accumulation and distribution strategies and minimize taxes

Estate planning – Managing your total wealth and efficiently distributing your estate in accordance with your wishes

We stay in touch with you regularly to respond to changes in your circumstances and priorities and to keep you updated on your investment progress. Your questions and concerns are important to us, so we return your calls personally and promptly.

NURTURING RELATIONSHIPS

OUR TEAM APPROACH

Our advisors represent a wide range of financial disciplines, enabling us to take a holistic approach to your needs and provide comprehensive investment and planning services tailored for you. We have built alliances with other financial professionals, including CPAs and attorneys, to ensure all aspects of your finances are properly aligned and your financial objectives remain in focus.

SUPPORTING OUR COMMUNITIES

At Investment Planning Advisors, we strongly believe in giving back to our communities by supporting local civic and charitable organizations. We are proud of the reputation we have established in our many years in the area, and we are thankful for the loyalty of our longstanding clients.

INDEPENDENCE POWERED BY LPL FINANCIAL

Investment Planning Advisors is supported by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with access to unbiased research and a comprehensive array of tools, resources and technology. As an independent firm with no proprietary products to sell or sales quotas to meet, we are able to offer you objective financial guidance and conflict-free investment recommendations.

*AS REPORTED BY *FINANCIAL PLANNING* MAGAZINE, JUNE 1996–2013, BASED ON TOTAL REVENUE.

You can trust us to provide objective advice and open communication, and to always put your interests first. We would be honored to discuss your situation and our ability to help you pursue the future you envision for yourself and your loved ones. Please contact us to schedule a no-obligation consultation.

INVESTMENT PLANNING ADVISORS

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