Henderson
WEALTH PARTNERS

Experienced, Comprehensive
Financial Guidance

Growing Forward Together

The Greatest Wealth Is Your Ability to Enjoy It

You have worked hard to accumulate your wealth, and you deserve the support of a caring professional who can help you live the life you envision. As your financial planning partner, our mission is to guide you through the wealth planning process, helping you gain confidence in your future so you can focus on the things in life that truly matter.

The professionals at Henderson Wealth Partners provide comprehensive wealth management services that incorporate the values and beliefs of our clients. We want you to have the contentment of knowing your financial legacy will offer the maximum impact for you, your family and the causes that are important to you.

Our team is committed to building an honest relationship with you while helping to take the stress and uncertainty out of financial decision making. Customer satisfaction is the foundation of our success. We take pride in the long-term relationships we have established with our clients based on our core principles of trust, integrity and personalized service. We would consider it a privilege to partner with you as we plan together for the years ahead.

> "We believe that wealth goes far beyond one's net worth. True wealth is found in the enjoyment of family and friends, the realization of dreams and aspirations, and the creation of a legacy that is personally meaningful to you."

– SAM HENDERSON

Service, Knowledge and Integrity

"Good fortune is what happens when opportunity meets with planning."

– THOMAS EDISON

Personalized Planning Focused on You

With more than 27 years in the financial services industry, Henderson Wealth Partners has a reputation as a top wealth manager in Southwest Florida. We believe that the successful pursuit of wealth preservation and contentment requires the guidance of an advisor who is knowledgeable and committed to excellence and integrity. Our years of experience with financial and estate planning, tax strategies and investment management, combined with our caring approach, add up to a partner you can trust to manage your wealth and help you stay on the path toward financial independence.

Our holistic approach starts with discovering your long-term goals, both personal and financial. After gaining a thorough understanding of your current financial picture, we develop and implement a customized plan that is aligned with your objectives and delivered with unbiased advice and exceptional service.

We maintain open communication with you and provide regular investment reviews to reevaluate your strategies, making adjustments as necessary to reflect any changes in the financial markets or your priorities. We are always available to help you with your smallest questions or your largest decisions. Our goal is to be your most trusted financial advisor and to ensure that you have the opportunity to turn today's decisions into tomorrow's legacy.

Comprehensive services tailored for your needs

We offer a wide range of services and products to meet the financial needs of individuals, families, retirees and business owners.

FINANCIAL PLANNING
strategies for wealth preservation and growth potential

RETIREMENT PLANNING
to help pre-retirees and retirees ensure a predictable stream of income for life

ESTATE/LEGACY PLANNING
to create a definitive plan for managing your total wealth and distributing your estate on your terms

INVESTMENT MANAGEMENT
to balance your need for immediate income with longer-term goals for asset accumulation

PHILANTHROPIC PLANNING
for individuals and family foundations

LIFE INSURANCE
to help protect what is most important to you

Our alliances with attorneys, accountants and other professionals enable us to take a comprehensive view of your financial picture. Working together, we can pursue your goals—for today, and for the future.

About Our Founder

Our founder, Sam Henderson, earned his Bachelor's Degree in Economics from the University of Florida. His years of experience in the financial industry, coupled with his unwavering commitment to his clients, make him a great choice as your primary source for financial advice.

Prior to establishing Henderson Wealth Partners, Sam had a successful career at a major Wall Street investment firm, managing money and providing financial planning services for high-net-worth individuals, families and business owners.

Sam brings a wide range of resources to his clients as a result of his interest and involvement in the Southwest Florida community. His most valued honor, however, is the lasting relationships he has developed with his clients over the years.

The Strength of Partnership

Henderson Wealth Partners is powered by LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with unbiased research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we have the freedom to offer you objective financial guidance and investment recommendations..

*As reported by Financial Planning magazine, June 1996–2013, based on total revenue.

Planning for your financial future is one of the most important things you will ever do. It would be our pleasure to partner with you to help you pursue wealth contentment, and we welcome the opportunity to be of service. Please contact us to schedule a no-obligation consultation at 800.581.3951.

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