



Financial Alternatives Inc

integrated wealth management

CHALLENGE

- You face a complex world of investing markets, tax laws and financial products.
- The financial industry is riddled with conflicts of interest and misaligned incentives.
- Where can you turn for independent, experienced counsel from a professional team who truly has only your interests at heart?

SOLUTION

- Since 1991, we've had a singular focus on providing integrated wealth management to successful individuals and families.
- Named by Rob Report Worth Magazine as one of the top wealth managers in the U.S.
- We work solely in your best interest and do not accept commissions.
- Our team has decades of experience and expertise.

OUR CLIENT SPECIALTIES

- Executives
- Retirees
- Families of Inherited Wealth

OUR INTEGRATED WEALTH MANAGEMENT SERVICE

- Combines financial planning and investment management
- Coordinates the efforts of other related professionals
- Uses a client centered holistic approach

ONGOING PROCESS

- Quarterly investment updates
- Unlimited meetings and calls as needed
- Annual planning reviews and updates

OUR PASSION

- Many firms talk about providing integrated wealth management but very few actually do. At Financial Alternatives, Inc. it's our passion.

POTENTIAL BENEFITS

- Clarity of vision and increased motivation
- A quicker more effective path to success
- Increased ease and self awareness around money
- More effective planning and investment strategies

- Call or Visit Our Website for Additional Information

INTEGRATED WEALTH MANAGEMENT



*Adapted from: Levin, Ross. Implementing the Wealth Management Index, 2011.