# EnVision Financial Group is a private wealth management practice

We provide comprehensive financial consultation and robust investment management services to a select clientele of sophisticated investors. We serve you as trusted advisors, devoting considerable time and resources to create customized strategies that help you simultaneously pursue your life passions while realizing your long-term goals and dreams. Our team of experienced professionals translates your financial objectives and preferences into wealth management solutions that help preserve your legacy and position you for success.

## OUR MISSION

EnVision Financial Group strives to help you minimize the day-to-day management of your finances so that you can maximize the time you spend with loved ones and doing what you most enjoy. To accomplish this, we invest in each client relationship to understand you and your needs, translating your vision into tailored financial

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# EXPERIENCE

Our team brings more than 75 years of experience working with clients to create goals-based financial plans and helping them navigate a variety of market conditions. We specialize in helping individuals, families and businesses grow and preserve their legacies for both their personal goals and future generations.

# TRUST

EnVision Financial Group strives to foster client relationships that endure for generations. We understand that you're entrusting us with more than assets—you're entrusting us with your family legacy, your business's future and your dreams. We take this responsibility very seriously, which is why trust, honesty and clear

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# COORDINATION

We work with you to create strategies that coordinate your life priorities, portfolio, investments and financial needs. Additionally, we partner with your CPA, estate planning attorney and other trusted advisors to help ensure cohesion throughout your financial life.

# FIDUCIARY

We serve you, your family and your business as fiduciaries. A fiduciary is an individual in whom another has placed the utmost trust and confidence to manage and protect property or money. It is a relationship in which one person has an obligation to act for another's benefit. This means that the discipline of putting your interests

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