White Pine Wealth – Your Family's CFO

Welcome to White Pine Wealth. As our client you are the most important part of our business. Your financial goals and concerns are our priority. We want to spend the time to know you and your family. A real human will answer your telephone call. Only under these conditions can we truly give you meaningful advice.

Many investors today have witnessed their financial institutions endure mega-mergers. They have seen the staff and the firm on their investment statement change. They've felt their level of import and personal service slip as they've become just a single customer in a pool of hundreds of thousands. Perhaps they've even seen their investment firm treat them as a prospect, pandering different products and services under the guise of 'cross-selling.'

We're offering a different experience. As a client of White Pine Wealth you are one of a few. We don't treat our clients as an opportunity to increase profitability, rather, they are the reason we exist. We are grateful for you. And we intend to treat you that way.

Broad Resources

We are supported by LPL Financial, the nation's largest independent Broker/Dealer*

Local Roots

White Pine Wealth is locally owned and supports charities and organizations in North Idaho.

Service Standards

Client calls & emails are returned same business day. Advisory clients enjoy personal reviews.

Experienced Team

Our staff draws upon over 20 years of industry experience when providing guidance and service.

**As reported in Financial Planning Magazine, 1996-2017, based on total revenue.*

For Individuals

Successful families, business owners, and retirees rely on us to guide them through their financial lives with their most important long term goals in mind. Our process begins with identifying future plans and aspirations and a roadmap on how to pursue them. As you and your family grow and change we are there with you. Your most important values don't change, however, and neither does your financial advisor.

Services:

• Investments
• Retirement Planning
• Family Trusts
• IRAs
• Insurance and Annuities

• Succession Planning
• Individual Case Consulting

For Businesses

As a locally owned business your focus is on the success and satisfaction of your customers and employees. We know because we are one too. Our corporate clients rely on us to provide critical support to enhance their client relationships and improve their employees' lives. We are proud to serve some of North Idaho's most admired companies.

Services:
• Retirement Plans
• Executive Deferred Compensation
• Liability Management
• Strategic Team Building
• Individual Case Consulting

North Idaho Community

We are proud to be locally owned and operated in North Idaho. Our clients live and work in this community and our success is thanks to them. Because of this, we support organizations that have a positive effect on this area, including: The Coeur Group, The Gee Foundation, 4H Booster Club, Hayden Lake Marathon, Gonzaga University, and Idaho Drug Free Youth.

CONTACT US

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Mon-Fri: 8:00 AM - 5:00 PM
Sat-Sun: By Appointment

Securities offered through LPL Financial.
Member FINRA/SIPC.

Investment advice and financial planning offered through Financial Advocates Investment Management, DBA White Pine Wealth Management, a registered investment advisor. Financial Advocates Investment Management, White Pine Wealth Management, and LPL Financial are separate entities.

The LPL Financial Registered Representatives associated with this site may only discuss and/or transact securities business with residents of the following states: CA, CO, FL, ID, OR, TX, UT, WA.