



# NO ONE STRATEGY FITS EVERYONE

Knowledge is power. It's also the foundation for intelligent and well informed decision making.



Innovative Wealth Partners offers a full range of financial strategies that are tailored and customized for unique situations that clients face in their financial lives. We strive to truly be your trusted partner for financial success

We know that managing your wealth and planning for important goals like retirement, the sale of a business, or dealing with estate planning can be complex and time consuming, which is where

over time. We assist individuals, professionals, and business owners in pursuing their financial goals and wealth objectives.

Treat others like you would want to be treated is a “value” we strive to live up to each day!

Learn about our process...

we help. Sound decisions require extensive research, expertise, and coordination across multiple financial disciplines. Effective outcomes can benefit from a partner you can trust to bring the right experience and resources to the table as you pursue your individual goals.

Our solutions are **TAILORED** to you!

What we can do  
for you

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## Investment Strategies

Whatever your objective, we can help you design an investment strategy tailored to your particular situation



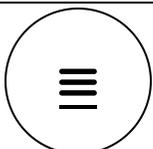
## Business Planning

Strategies designed for everyone from the employer to the self employed individual to the corporation



## Financial Planning

We can take some of the uncertainty out of preparing for your financial future so you can move forward with confidence



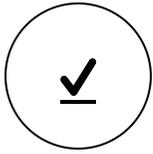
## SPECIALIZED STRATEGIES

We offer many “outside the box” ideas to our clients and view ourselves as specialists in this area. We spend a great deal of time studying the economy and researching opportunities in the industry.



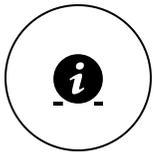
## PAYING FOR COLLEGE

College is getting more expensive by the day and we feel that eventually this trend will change but for now it certainly has become the new normal. Here are some funding sources that we have used in the past in order to pay for college.



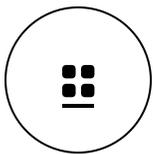
## PENSION OPTION SELECTION

Typically a pensioner (person who has the pension) would have several options to choose from. There are several factors to keep in mind when making a selection



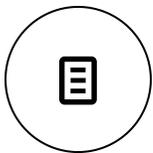
## 5G & TRENDS

Why is there a big push for 5G coverage and what will it mean to those who will get it? It will be utilized by us all most likely in one way or another but the focus will really be technologies such as augmented reality (AR), virtual reality (VR), artificial intelligence (AI) and the internet of things



## ESTATE PLANNING STRATEGIES

Over the years there have been several occasions where we have ran into some complicated estate tax planning issues that require a bit more time and attention than the average middle income American might need.



## INSURANCE OPTIONS

Insurance can be a bit of a daunting issue for the average every day consumer. Here at Innovative Wealth Partners we try to take confusing topics and make them easier to understand and comprehend.

*Not all “fat” is bad.*

*The proper perspective is vitally important in life. We feel truth/honesty is a cornerstone in a healthy relationship.*

With no proprietary product or quotas, we offer access to a broad universe of products and services from different companies to meet unique client needs. Our infrastructure affords clients streamlined strategies with fewer administrative fees. You

can feel confident that your consultant at Innovative Wealth Partners has the access to comprehensive research, infrastructure, and support systems that help manage your financial life.

We look forward to serving you over time and developing a high service relationship that is mutually beneficial.

TAKE THE NEXT STEP

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