

## MONEY DOESN'T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you're not alone.

[What makes us different](#)

[Schedule an appointment](#)

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free guides.

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## 3 Methods to Not Run Out of Money



## 4 Common Mistakes People Make With Their First Million



## 7 Secrets to Accumulating Your First Million



## 7 Tips to Successfully Transfer Wealth to Your Kids



## 8 Legitimate Tax Loopholes You May Be Missing



## 8 Blunders to Avoid in Retirement

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# People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life and your future.

At Sovereign Investment Group Wealth Management, we believe clients should understand everything that is happening with their money; that advisors should be just as good about explaining investments as they are at making them.

- + What are you going to do with my money?
- + Can you handle the complexity of my situation?
- + How can you make my life easier?

## Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?



0-2%



2-4%



4-6%



6-8%



More than 8%

Next

## How to get started.



1. Schedule an appointment



2. Meet with us for a custom listening session

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### 3. Get your personalized strategy

Schedule an appointment

Watch Video

## Schedule an appointment.

Please provide your name and email and we will have an advisor contact you.

First Name\*

Last Name\*

Email\*

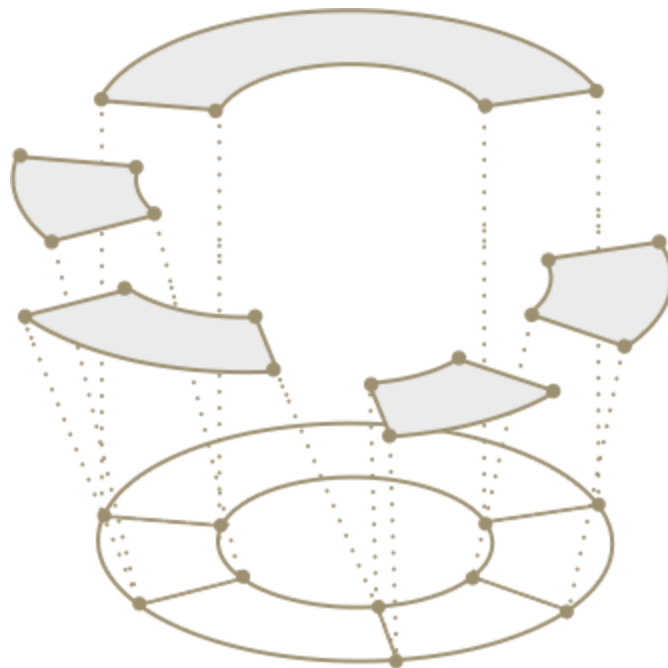
Phone Number\*

Submit

Our financial planning services are built on trust,

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Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams. [Explore services](#)



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# Connect with an Advisor

Please provide your name and email and we will have an advisor contact you.

First Name\*

Last Name\*

Email\*

Phone Number\*

Submit

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# Understanding Today's Financial Environment

Welcome. We are Sovereign Investment Group, a financial organization in the Lake Norman area. We can help take the mystery out of preparing for today and tomorrow. Whether your goal is preparing for retirement, college savings, or estate strategy, our personalized service focuses on your needs, wants, and financial goals and objectives.

Our professionals have nearly 100 years of combined experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you through all stages of your life.

Contact one of our financial advisors to request a complimentary consultation.



## Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

[Read more](#)



## Carson Partners

Carson Partners is a network of growth-minded advisors with one common massive transformative purpose: to be the most trusted for financial advice.

[Read more](#)

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### Our Locations

Sovereign Investment Group Wealth Management is headquartered in Mooresville, North Carolina. Contact us today to speak with a wealth advisor or financial professional.

[Read more](#)

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## Insights

Sovereign Investment Group Wealth Management's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. [Read more](#)



### News

BUSTING TH

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ORTGAGES

A few years back, I conducted and published research in the *Journal of Financial Planning* that showed [Americans don't understand reverse mortgages](#). In fact, respondents scored below 50 percent on a 10-question true-false quiz.

[Read more](#)

### Blog post

## HOW TO BUY A CAR WITHOUT LOSING YOUR MIND (OR YOUR WALLET)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It's painful and annoying, I know I have to deal with it, but it's going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

[Read more](#)

### Weekly Market Commentary

## WEEKLY MARKET COMMENTARY – JULY 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

[Read more](#)

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