MONEY DOESN'T HAVE TO BE COMPLICATED.

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

What makes us different

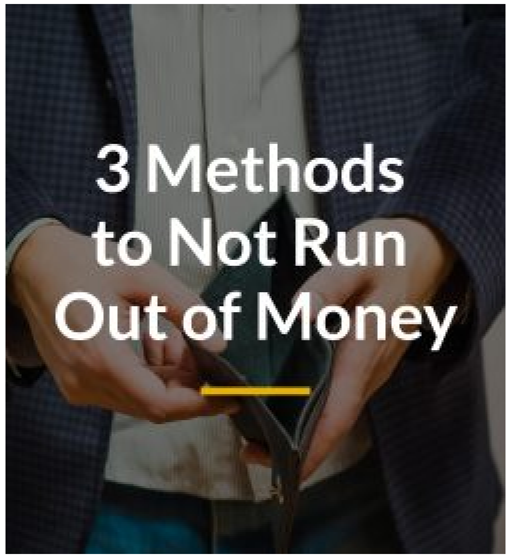
Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free g


3 Methods to Not Run Out of Money


4 Common Mistakes People Make With Their First Million


7 Secrets to Accumulating Your First Million

Get more Insights

FORBES TOP-RANKED TEAM

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 Cultivate Wealth, we believe clients should unders
that is happening with their money; that advisors sho
good about explaining investments as they are at mak

+ 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

3. Get your personalized strategy

Schedule an appointment

Schedule an appointment

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

First Name*

Last Name*

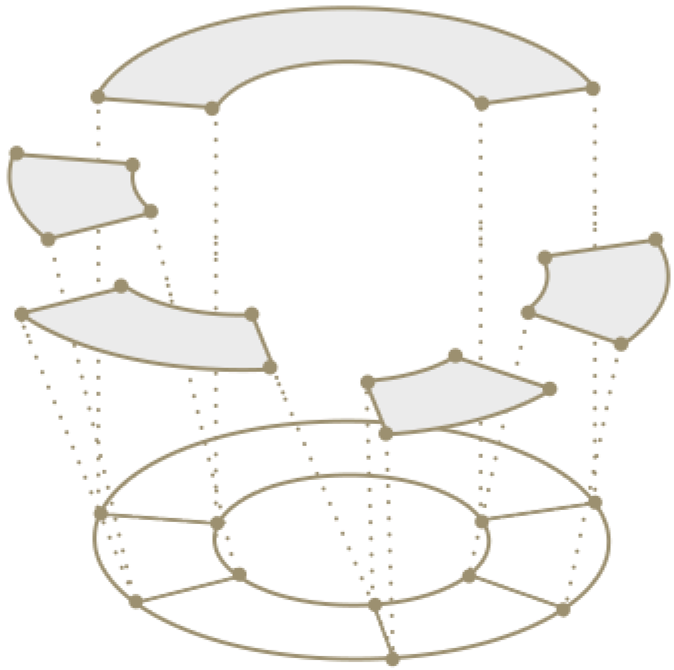
Email*

Phone Number*

Submit

Our financial planning services are built on trust, transparency and accountability.

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



Who We Are

Cultivate Wealth's mission is to simplify the complex world of investing and guide our clients to financial freedom as their most trusted advisor so they can pursue **what matters**.

Cultivate Wealth, LLC is an independent wealth management firm based in DeForest, Wisconsin that specializes in providing financial planning and portfolio management services to individuals, families, business owners, and professionals.

We serve clients who desire a life of financial freedom and seek advice from a trusted member of our professional team.

We adhere to the following **core values**:

FOCUS ON PEOPLE–Our team of elite professionals are fiduciary minded, client centered, and have a strong reputation in the industry as well as in the communities for which they serve. You are sure to be greeted with a smile, an attention to service, and a desire to help.

ENHANCED CLIENT EXPERIENCE–We are committed to an exceptional client experience from the first time we meet, through the wealth plan design and implementation process, and ongoing plan review and investment monitoring. Our strategic approach is inclusive to the entire balance sheet to ensure no detail is overlooked. Whether you are just starting out and in the accumulation phase or are nearing retirement and seeking future income, we design a plan for your stage of life. Our hope is you will leave with financial clarity and the confidence to implement your life's plan so you can spend more time on what matter most to you.

PROFESSIONAL KNOWLEDGE–We are firm believers in making the complex simple for our clients. With over 28 years of combined industry experience, our advisors are committed to having straightforward conversations while providing a personalized financial plan and investment portfolio so our clients can achieve the life they desire.

We are always looking to raise the bar when it comes to providing world class wealth management to the clients we serve. Our wealth advisors utilize our strategic partners, the Wealth Enhancement Group and Investment Committee and Research team, for complex planning needs and portfolio design. In addition, we firmly believe in investing in our team to deepen their knowledge base in several subject areas including: financial planning, education planning, risk management and insurance planning, investment and tax planning, retirement savings and income planning, and estate planning.

***Contact us today* to begin cultivating the life you desire.**

Jennifer Homman, Founder and CEO

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 are growth-minded advisors wholly dedicated to helping clients reach a higher purpose for their wealth and design a lasting legacy for their families.

Read more

Our Locations

Cultivate Wealth is headquartered in DeForest, Wisconsin. Contact us today to speak with a financial advisor or financial professional.

Read more

Insights

Cultivate Wealth’s team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. Read more

News

BUSTING THREE HALF-TRUTHS ABOUT REVERSE MORTGAGES

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 Y

Weekly Market Commentary

WEEKLY MARKET COMM

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

The S&P 500 slipp
new high the previc
The MSCI ACWI inc
BarCap Aggregate I
continue to fall as
mount.

Read more

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