815-942-5900

Personalized Financial Services

Your Choice for Financial Services

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Welcome to Midwest Family Wealth Management

Focused on providing premiere financial service, Midwest Family Wealth Management was founded on two guiding principles:

- Deliver trusted advice with exceptional service
- Confirm our clients understand what they own and why they own it

By aligning with LPL Financial, the nation’s largest independent broker dealer, (as reported by Financial Planning magazine, June 1996-2017, based on total revenue.), we are able to provide objective advice and a wide array of products and services to meet our client’s financial needs and avoid the questions and complications of proprietary products often found at many of the large brokerage firms.

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Retirement Planning

Through our process we help our clients plan for a lifetime income stream that they will need in order to live the life they desire during retirement. This analysis involves clarifying an optimal retirement age and addressing strategies to overcome shortages, as well as planning for the proper distribution and management of surpluses.

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Investment Management

Historically, at Midwest Family Wealth Management we provide a disciplined investment management process that delivers an institutional approach and process to retail investors. By increasing diversification to non-traditional and alternative asset classes, which are negatively correlated to the broader US markets, we are able to help you in your efforts mitigate risk and decrease market volatility for your portfolio.

No strategy assures success or protects against loss. : Correlation is a statistical measure of how closely two securities move in relation to each other. Positive corrrelation implies moving in a similar direction, and negative correlation implies moving in opposite directions. Investing involves risks including the loss of principal. Alternative investment strategies carry a higher degree of risk.

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Have a Question?

Name

Email

Phone

Question

SEND

Contact

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