



White Cloud  
WEALTH MANAGEMENT

# Does Your Financial Journey Have a Destination?

Money and markets are the means, not the goal. Align your finances to maximize your time with the people and places you truly value.

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**Financial Planning, Tax Planning, Asset Management**



## **Individual/Family Retirement Planning**



## **Business Retirement Plans**

PUTTING OUR CLIENTS FIRST

# Always Fiduciaries

Being a fiduciary means that we would never recommend an investment we wouldn't use ourselves.

THE WHITE CLOUD WAY

HOW WE SERVE

## Core Values

We operate under three core values. Each of our client's individual plans is unique, but all benefit from a clear understanding of their financial position and future.



### Integrity

Fees are simple and transparent: our compensation is the same regardless of the investments chosen in your portfolio.

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## Optimism

With a little effort, there are no goals that can't be accomplished.

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## Prudence

We understand your situation before we recommend solutions

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