

Whitacre & Hall Wealth Management, LLC

☎ 317-471-1042

Whitacre & Hall Wealth Management, LLC

Your choice for Financial Services

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Welcome!

As CPA's and financial consultants, Kristin Hall and Kevin Whitacre are dedicated to helping you achieve financial success. We take a long-term approach, working with quality organizations and products and using established investment techniques.

Part of our investment philosophy is to minimize taxes and debt. As CPA's we focus on tax efficient strategies, so our clients can obtain a higher after-tax rate of return. We also believe that client portfolios should contain some risk management strategies for downside protection. Also, it is important to set goals and track toward those goals so one does not get in the trap of chasing unrealistic returns.

Kristin and Kevin work personally with our clients. You do not get handed off to a staff person, we work directly with you.



Our Process

We create strategies that are tailored to your needs and goals.

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Our History

Years of experience have prepared us to guide you through your life transitions.

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Our Values

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

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Understanding Today's Financial Environment

We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

Our team of professionals have years of 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.

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Your Financial Future

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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"Remember, what does 'retirement' mean? It doesn't mean that you're a couch potato. Leisure is not the same things as rest. If you're bicycling five miles a day, that's leisure, but it certainly takes a lot of effort."

Robert Fogel

Have a Question?

Name

Email

Message

SEND

Contact

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