At IM Wealth Partners, we take the mystery out of financial planning. We work closely with our clients to create strategies for real life – college, cars, daycare, home improvement, vacation homes, retirement – whatever your goals and dreams. **What's your plan?** Unlike most financial planners, we are independent and not bound to sell propriety products, nor are we focused on only one or two aspects of your financial snapshot. **We believe**... in holistic financial planning – looking at the big picture and making smart decisions for spending, saving and protecting your wealth in ways that will impact your family both today and tomorrow. Think of us as **Your Personal Financial Concierge**. We invite you to learn more **About Us** and our unique offerings, and **Contact Us** to begin mapping out your financial plan.

WHAT'S YOUR PLAN?

Are you confident that you have a coordinated financial plan that will last a lifetime and beyond? If not, it's time. Let IM Wealth Partners build a customized, all-inclusive, economically efficient model for you, based on your wants and needs.

WE BELIEVE...

We believe in a holistic model for financial planning. We offer access to experienced counsel to ensure every aspect of your financial wellbeing – from savings to mortgages to insurance and so much more.

We believe in fact, not opinion. Our planning models guide financial recommendations based on economic and mathematical formulas, not guesswork.

We believe in building lifelong relationships with our clients – providing highly personalized service that takes your life goals and challenges into careful consideration as we create and continually reassess your financial plan for today and tomorrow.

YOUR PERSONAL FINANCIAL CONCIERGE

Our full-service concierge model equates to less time and less aggravation for you by providing comprehensive, expert guidance that will help you to reach your desired result. Let us take the fear of the unknown out of financial planning and put you on a smart and efficient path toward achieving your goals and dreams.

ABOUT IM WEALTH PARTNERS

We are a comprehensive, independent financial services firm founded in 2003, with the goal of completely redefining the concept of financial planning. We want to bring something that hasn't been brought before.

We want our clients to seek us out because they are looking for a one-stop shop where they can coordinate nearly every aspect of their finances with advisors they can trust.

We aim to impact the everyday monetary decisions of our clients, and ultimately enhance their ability to achieve more financially than they ever thought possible.