Jim Lewis, AAMS®

Wealth Advisor

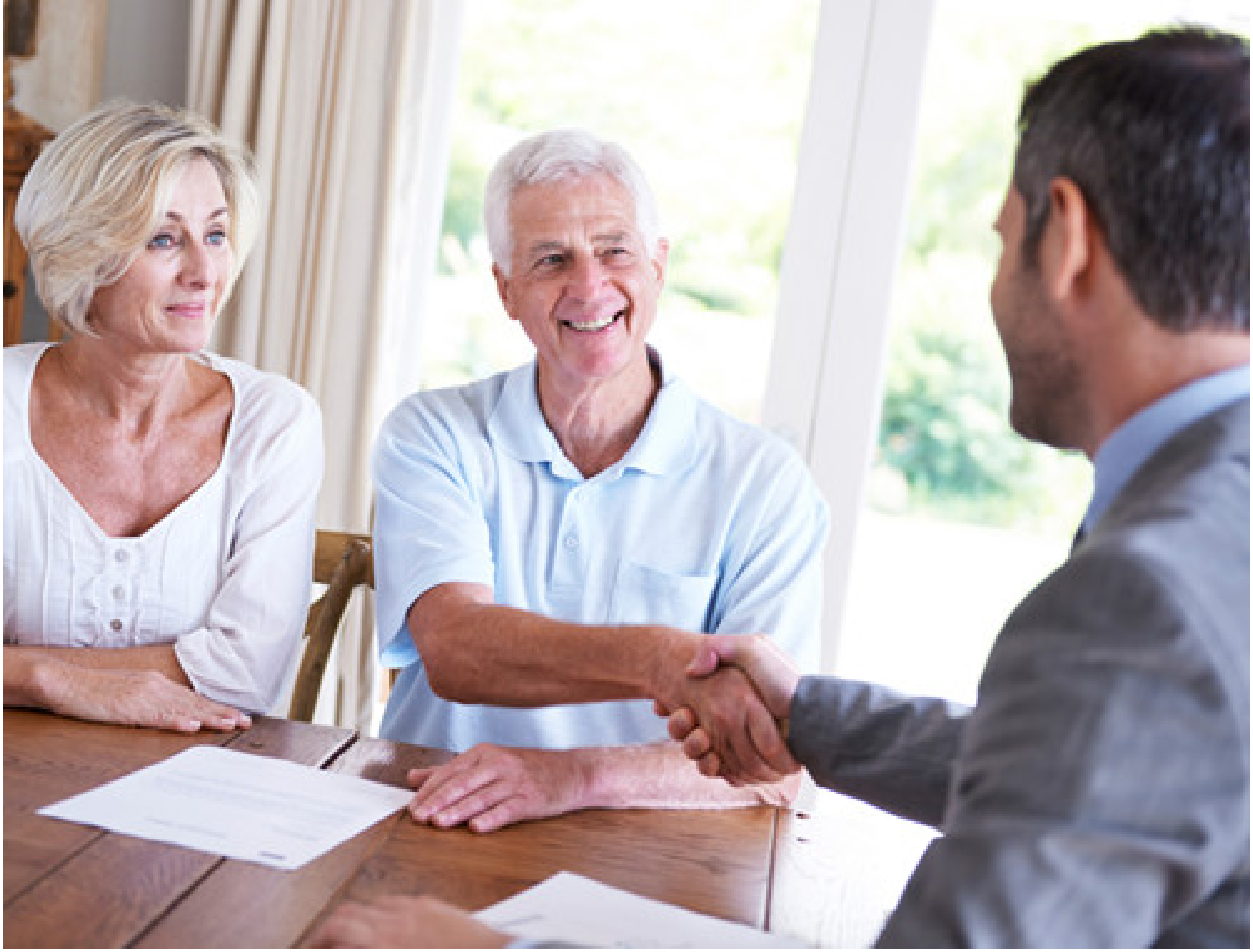
Understanding Your Financial Future

Our goal is to help our clients with every aspect of their financial lives. We provide personal service and we strive for the financial stability and security that will make your dreams a reality.

We have a "hands on" approach to financial guidance. We take the time to get to know you and to understand your goals. Then, we do everything in our power to keep you focused on where you want to go and we advise you on how to get there. We work closely with you over time to maintain a disciplined approach to realizing your dreams.

Our company is based on the principle that understanding your current financial situation is vital to successfully making prudent decisions about your financial future. If you have any questions about your finances, or you wish to schedule an appointment, send us an email or give us a call at

We can help you address your needs of today and for many years to come. We look forward to working with you through all stages of your life, please call 317-663-7277.



Services

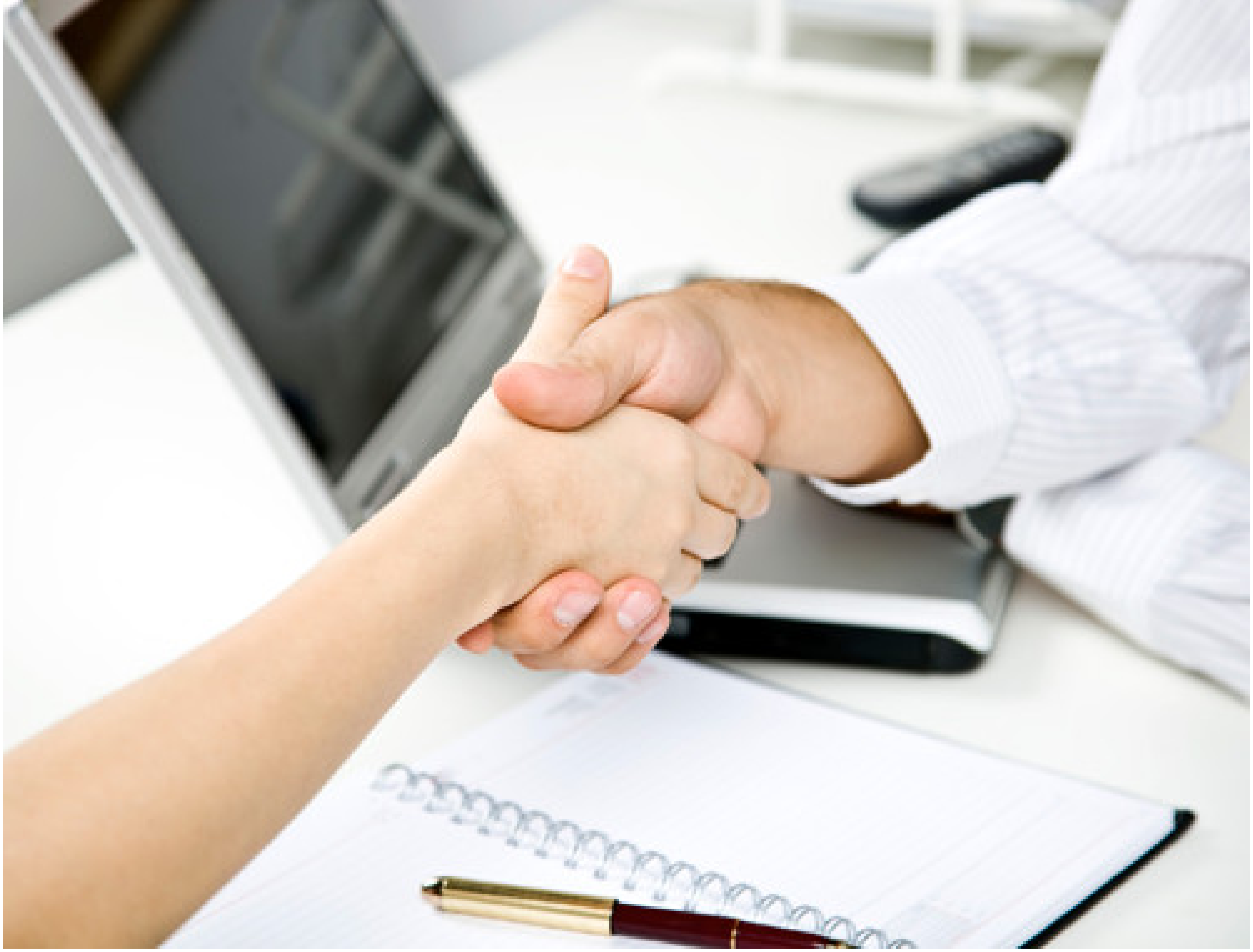
We create strategies tailored to your goals.

Learn more

Independence

Objectively we put your needs first.

Learn more



Trust

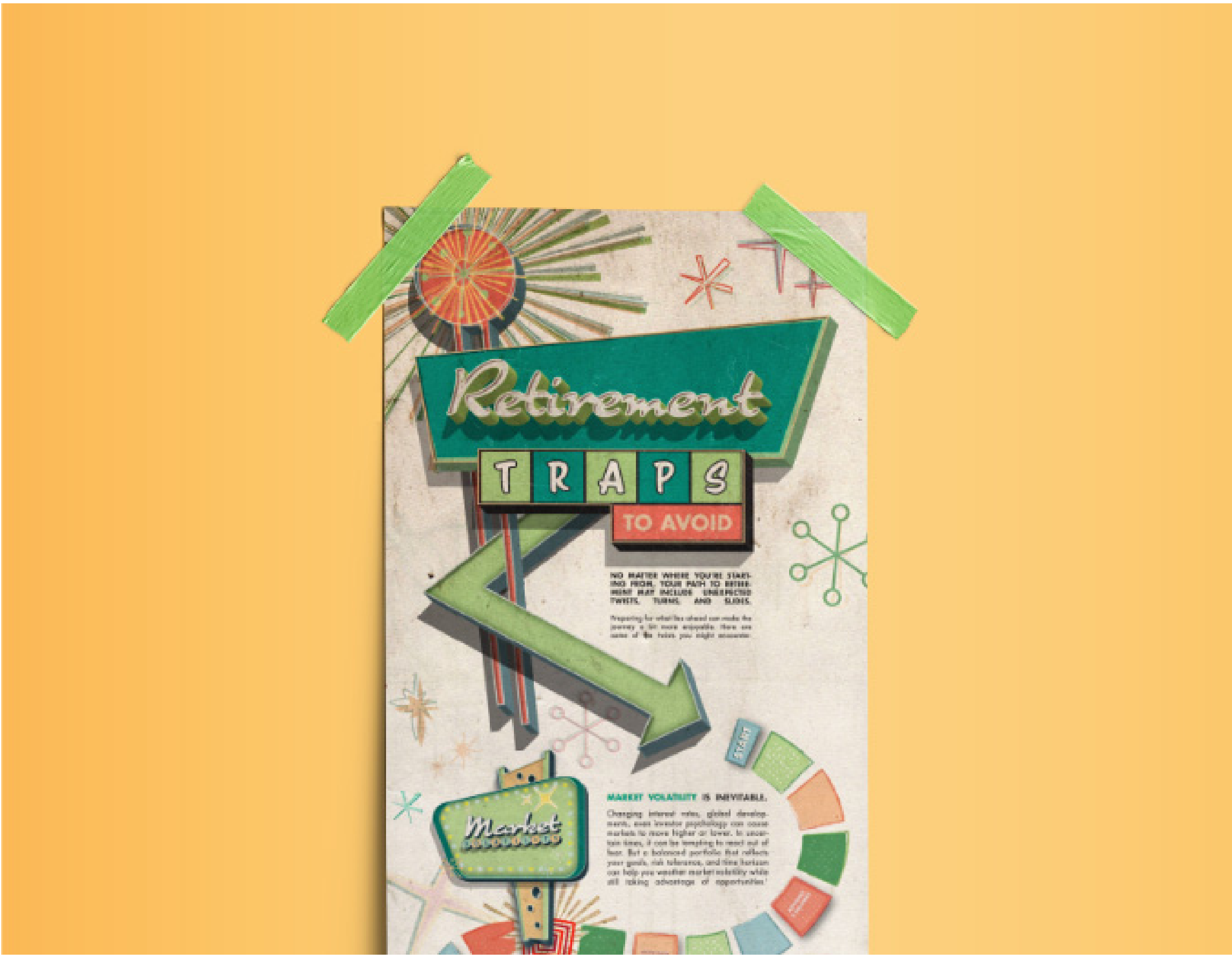
We enjoy building trusted relationships that span generations.

Learn more

Services

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

Helpful Content

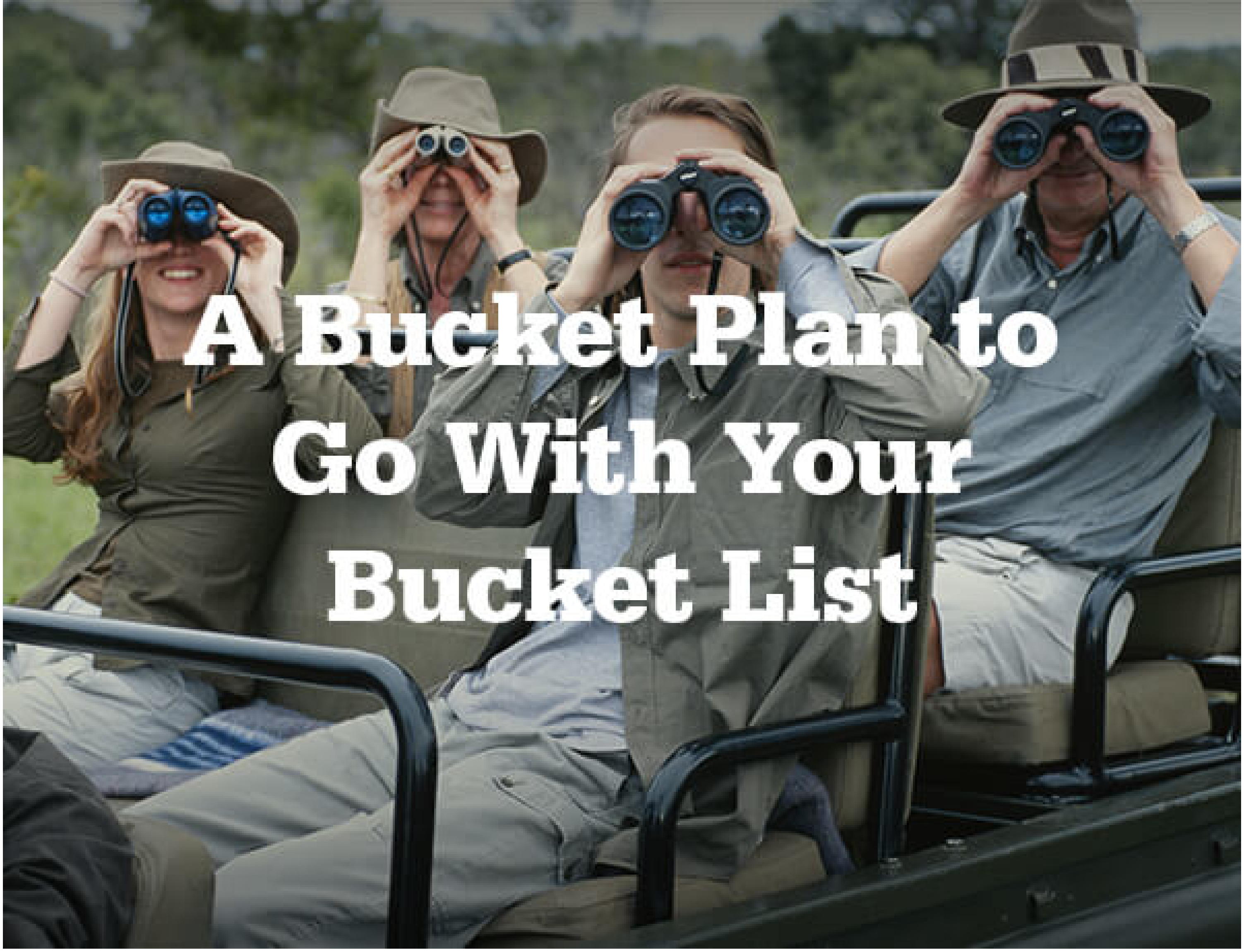


Retirement Traps to Avoid

Beware of these traps that could upend your retirement.

Tuning Your Social Security Benefit

When should you take your Social Security benefit?



A Bucket Plan to Go with Your Bucket List

Longer, healthier living can put greater stress on retirement assets; the bucket approach may be one answer.

Articles

Calculators

Presentations

Videos

Weekly Market Commentary

Each week the LPL Financial Research team assembles thoughtful insight on market and economic news.

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A Few Clouds

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