CERULEAN
PRIVATE WEALTH ADVISORS
— AT SANCTUARY WEALTH PARTNERS —

Cerulean Private Wealth Advisors is an independent advisory firm dedicated to helping clients enhance wealth, protect assets, and establish legacies for today and tomorrow.

Relationships are at the foundation of everything we do.

At Cerulean Private Wealth Advisors, we believe successful financial advice begins with building close personal relationships…precisely what we forge as we serve corporate executives, business owners, professional athletes, high-net-worth individuals, and their families.

We measure our success based on our clients' satisfaction and how well we've helped them achieve their goals. When our clients succeed, we succeed — it is to deliver the highest level of service to our clients to help them prioritize and balance the accumulation of wealth, the utility of money, and the creation of legacy. Our recommendations — backed by education, experience, and certification as a Certified Private Wealth Advisor® — reflect our commitment to serving as fiduciaries for our clients, operating in their sole and best interests at all times.

Our Mission

At Cerulean Private Wealth Advisors, we believe in challenging ourselves to make a meaningful difference in our clients' lives by providing comprehensive financial plans and investment solutions.

On our clients' behalf, we are honored to fulfill our mission, which includes the following essential tenets:

- We create comprehensive financial plans for high-net-worth individuals and their families that align their assets with their personal goals and objectives.
- We focus on tax efficiency, entity structure, effective transfers for sales of businesses, real estate, and other closely-held assets.
- We understand that, as human beings, we are subject to various biases based on emotion, existing beliefs, and how we process information.
- We identify opportunities and we understand risk, the ideal blend in our quest to provide objective advice and implement strategies designed to pursue our clients' financial goals within a risk-mitigating environment.
- We take a holistic approach, whereby we consider our clients' personal goals and objectives as we create integrated financial plans that take into account tax planning, investment and portfolio structure, estate planning, and asset protection.