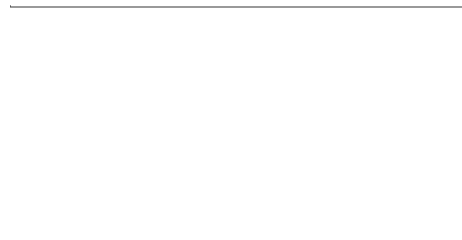


WELCOME TO
CREATIVE PLANNING
WEALTH MANAGEMENT
REDEFINED



-THE NEW YORK TIMES
(2017)

We took a broken system and completely turned it on its ear. Our unique financial planning-led approach considers income, tax bracket, retirement goals, estate plans and current assets to create a holistic plan that's completely customized for you. That's how we've become one of the top independent wealth management firms in America, with over \$40 billion in assets as of April 2019 and advisors serving clients in all 50 states.

WE'RE DIFFERENT BECAUSE

HERE'S WHAT THEY'RE SAYING:

Rated as the No. 1 Independent Wealth Management Firm in America in 2017

(<https://creativeplanning.com/press-room/barrons/>)

Peter Mallouk Named the Advisor of the Year 2008

(<https://creativeplanning.com/press-room/boomer/>)

Rated as the No. 1 Wealth Management Firm in America in 2014 and 2015

(<https://creativeplanning.com/press-room/cnbc/>)

FT

Named to Top RIAs list in America 2014, 2015, 2016, 2017 and 2018

(<https://creativeplanning.com/press-room/financial-times/>)

Peter Mallouk named to Worth Magazine's Power 100 List for 2017 & 2018

(<https://creativeplanning.com/press-room/worth/>)

Creative Planning is different because our approach to designing your investment portfolio is different. We take a comprehensive, financial planning-led approach with every client, which means we consider your income, tax bracket, family makeup,

insurance, inheritance, estate plan and more. We feel that's the only way to design a portfolio that makes holistic sense.

Proper portfolio construction requires more than just a risk-tolerance questionnaire. There are many factors that go into designing a portfolio that is optimal for you, so we take the time up front to make sure we have the information necessary to select the investments we believe have the best opportunity of meeting your goals and objectives. For example, understanding your income tax bracket, current and future income sources – such as Social Security, pension or rental income – as well as any real estate or business interests plays a critical role in designing the portfolio best suited to meet your unique needs.

We combine our personalized approach for portfolio construction with a team of experienced and credentialed advisors in tax, insurance, estate planning and more. This ensures that we are able to take a holistic view of managing your wealth, providing strategic investment guidance in response to changes to your personal situation, income tax or estate tax laws.

In addition, we're also able to provide a range of client services in-house, including tax preparation, insurance and estate planning. This means we can handle our clients' needs from advice to implementation in almost any area of their financial life.

REQUEST A MEETING ([HTTPS://CREATIVEPLANNING.COM/REQUEST-A-MEETING/](https://creativeplanning.com/request-a-meeting/))

HOW THEY WORK

VS

HOW WE WORK

THEM

They're not legally required to act in your best interest – only to do what is suitable for you.

They sell proprietary products that can find their way into your portfolio, even if they're not what's best for you.

Your investments could be subject to hidden fees, revenue sharing and commissions.

Additional services are farmed out to partners, often under one roof, with a kickback to the referring firm.

Your team may not have the education and experience your wealth requires, or may be handling multiple roles rather than specializing.

US

We're fiduciaries, legally bound to always act in your best interest.

We don't push proprietary products. Instead, we work with you to build a portfolio that suits your needs.

We have a simple, transparent fee structure determined by the amount of assets we manage on your behalf.

We offer comprehensive services, including financial planning, estate planning, investment management, tax services and more.

Your team will include an investment manager, CERTIFIED FINANCIAL PLANNER™ practitioner, an attorney and a CPA.

WE HAVE REPRESENTATIVES NEAR YOU, SO WE'LL MEET YOU WHEREVER YOU ARE.



REQUEST A MEETING ([HTTPS://CREATIVEPLANNING.COM/REQUEST-A-MEETING/](https://creativeplanning.com/request-a-meeting/))

OR CALL US AT
(866) CREATIVE

RESOURCES FOR INVESTORS WHO WANT TO MAKE MORE
INFORMED CHOICES.



READ MORE ([/BLOG/](/blog/))

PETER MALLOUK (<https://creativeplanning.com/peter-mallouk/>) – PRESIDENT
& FOUNDER, CREATIVE PLANNING

LOCATIONS

Creative Planning has advisors who work with clients in all 50 states.

KANSAS CITY HEADQUARTERS

5454 W 110th Street, Overland Park, KS 66211

MAPS/DIRECTIONS

([HTTPS://GOO.GL/MAPS/WO
CWGRF8H2P2](https://goo.gl/maps/woCWGRF8H2P2))

ADDITIONAL OFFICE LOCATIONS

OFFICE LOCATIONS

(/OFFICE-LOCATIONS/)

CONTACT US

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FAX: (888) 243-9402

cpi@creativeplanning.com (<mailto:cpi@creativeplanning.com>)

REQUEST A MEETING

([HTTPS://CREATIVEPLANNIN
G.COM/REQUEST-A-
MEETING/](https://creativeplanning.com/request-a-meeting/))

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**INVESTMENT MANAGEMENT
([HTTPS://CREATIVEPLANNING.COM/INVESTMENT-MANAGEMENT/](https://creativeplanning.com/investment-management/))**

**HOW WE'RE DIFFERENT
([HTTPS://CREATIVEPLANNING.COM/HOW-WERE-DIFFERENT/](https://creativeplanning.com/how-were-different/))**

**WHY WE EXIST
([HTTPS://CREATIVEPLANNING.COM/WHY-WE-EXIST/](https://creativeplanning.com/why-we-exist/))**

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